

- Bank account number
- Bank routing number
- Social Security Card & Date of birth for all dependents
- Valid Driver's License
- W-2 forms from all employers (your spouses, if filing a joint return)
- 1099 forms if you (or spouse) completed contract work
- Investment income information
 - interest income (1099 INT)
 - dividend income (1099 DIV)
 - proceeds from sale of stock (1099B) and cost basis from stock sale
 - income from foreign investments
- Statement from State & City refunds prior year
- Unemployment income
- Rental property income & expenses
- Social Security income (Form SSA)
- Estimated Taxes Paid
- Miscellaneous income
 - jury duty
 - lottery
 - gambling
- Any of the following if you received them
 - 1099 Misc (other miscellaneous income)
 - 1099 MSA (distributions from medical savings accounts)
 - 1095A (health insurance market place statement)
 - 1099SA (health medical distributions)
 - 1095-B or C (health coverage information)
 - K-1's
- HSA Contribution Form 5498SA (Health medical account contribution)
- IRA contribution information (Year end statement, if you made a Traditional or Roth contribution)
- Mortgage interest statement (Form 1098)
- Current Winter & Summer tax bill whether paid or not (can be printed offline or picked up at City Hall)
- Student Loan Statement (Form 1099E, students can obtain online)
- Tuition statement (Form 1098T, students can obtain online)
- Proof of health insurance
- Moving expenses (if you moved for a job)
- Childcare cost (provider name, address, tax id)
- Adoption cost
- Charitable contributions/donations (date, amount, statement)
- Qualified business expenses (mileage & expense worksheet)
- Medical expenses (doctor, dentals, eyes, co-pays, rx, medical equipment)
- Miscellaneous deductions (dues, licenses, tax preparation fees)