2025 Tax Documents

- **Bank account and routing number** for at least one of the following:
    - Checking or savings account at a bank or credit union

Income

Employment Income

- **W-2 form(s)** for all jobs last
- **Overtime pay records** (last pay stub of the year or other)
- Tips income records (last pay stub of the year or other)

Self-Employment Income

- **1099-NEC and/or 1099-K**
- Records of income received and not reported on 1099 forms
- **Records of expenses**
- **Record of estimated tax payments**

Retirement or Disability Benefits

- **SSA-1099 form** for Social Security benefits
- **1099-R** for pension/IRA/annuity income

Unemployment Income

- **1099-G** for unemployment benefits

Other sources of income

- **1099-G** for refund of state/local income taxes
- **1098-T** for scholarships/fellowships
- **Income or loss from the sale of stocks, bonds, or real estate**
- **Income and expenses for rental property**
- **Alimony** received
- **Statements for prizes or lottery/gambling winnings**
- **1099-INT/1099-DIV** for Interest and dividend statements
- Records for any other income
- **Income or loss from the sale of stocks, bonds, or real estate**

Education

- **Form 1098-T** for tuition
- Form 1098-E Interest paid on student loans
- 529 Plan (form 1099-Q) distributions and contributions
- Expenses for books and school supplies (college only)

You may be able to claim tax deductions for some of the expenses you have. These deductions reduce the income you are taxed on. Bring documentation for all the following expenses you have.

- **Retirement contributions**, including a 401(k) or IRA
- **State and local taxes** you've paid
- **Mortgage statements and property tax bills** if you are a homeowner
- **Childcare expenses** in 2025, including payment records or receipts and provider's name, address, and federal tax ID number (either their Social Security Number or Employment Identification Number)
- **Receipts for charitable donations**
- **Medical and dental bills**
- **New car loan interest**: Vehicle Identification Number (VIN) and lender interest statement for cars purchased in 2025

Healthcare and insurance

- **Form 1095-A** if you had coverage through the Health Insurance Marketplace
- 1099HC from Massachusetts for healthcare. **(Mass Residents)**