

# Taxpayer Checklist

Filing a tax return could give you back thousands of dollars to spend on what you need.

This year, more people than ever before are eligible for tax credits through the Child Tax Credit (CTC) and Earned Income Tax Credit (EITC). This is extra money for you to put toward groceries, childcare, and more. All you need to do is file a tax return.

Use this checklist to make sure you have everything you need to file and get one step closer to your refund. Free tax help from IRS-certified volunteers is available at [GetYourRefund.org](https://www.getyourrefund.org). If you have any questions about these documents, ask your tax preparer.

## Personal Information



- Government-issued photo ID
- Social security cards or Individual Taxpayer Identification Number (ITIN) letters for you, your spouse, and any dependents
- Copies of last year's state and federal tax returns, if available

### If you want your refund via direct deposit:

- Bank account and routing number or a voided check
- Pre-paid card and routing information
- Venmo or Cash App account details

## Sources of Income (Bring all that apply)



- W-2 forms for all jobs worked in 2021
- Unemployment form 1099-G if you claimed unemployment benefits in 2021

### Other 1099 forms for other income earned in 2021, including:

- 1099-NEC (common for contractor and freelance work)
- 1099-K (common for gig workers)

## Other Documents



### Notices or documents sent by the IRS, including:

- IRS Notice 1444/1444-B/1444-C for stimulus checks
- IRS Letter 6419 for Child Tax Credit advance payments
- IRS Letter 6475 for your third stimulus check

### If you purchased coverage through the Health Insurance Marketplace:

- 1095-A Form