

TAX TIME CHECKLIST

Driver's license, spouse's also, and bank name, routing & account number, checking or savings noted.

Any source of income: W-2 or 1099

Social Security statement

Form 1099-G if you received any unemployment

Form 1098-T if you took any college classes or have a student in college.

1099 forms for Bank Interest, Dividends, Investments

Form 1095-A Market Place Insurance.

Form 1098 Mortgage Interest.

Property Tax Paid

Renters, *if Indiana resident*, amount per month & number of months.

Childcare Name and address of the provider plus total paid in 2025.

A note of any questions or concerns you want the Preparer to address.