



TAX TIME CHECKLIST

Make the most of your tax refund

Tax time doesn't have to be stressful. Being organized and prepared can make the process smoother and help you reach your money goals.

What to bring

1 Tax documents

Avoid multiple trips by bringing your important papers and information when you meet with your tax preparer.

- Photo ID
- Social Security card or verification letter, or Individual Taxpayer Identification Number (ITIN) assignment letter, for all family members
- W-2 forms for all jobs worked in 2022
- Form 1099-G for unemployment compensation and state or local tax refunds
- Form W-2G and other 1099 forms for other income in 2022
- Child care provider name, address, and tax ID number, and amount paid in 2022
- Copy of last year's state and federal tax returns
- Other applicable tax-related documents, such as: interest statements, federal loan documents, retirement statements, list of organizations to which you made charitable donations, etc.
- Any letters, correspondence, or other documents sent to you by the IRS or your state tax administration
- Forms 1095-A, B or C, Affordable Health Care Statements, or health insurance exemption certificates

2 Account information

Bring your bank or credit union account information so you can easily deposit your refund and use some of your refund for savings.

- Bank, credit union, or prepaid card account and routing number
- Voided check



Consumer Financial
Protection Bureau

Email: file@nfscorp.org
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