

2026 TAX PREPARATION DOCUMENT CHECKLIST

- ✓ Valid government ID for you (and your spouse)
- ✓ Social Security cards or ITIN for you and any dependents being claimed on your tax return
- ✓ Voided check or bank statement with routing and account number for direct deposit
- ✓ All income statements:
 - ✓ W-2
 - ✓ 1099-G (unemployment)
 - ✓ All 1099 Forms
 - ✓ 1099-R (pension)
- ✓ Your tax return from last year
- ✓ Child-care expenses
 - ✓ Daycare Provider's Name, Address, and EIN
- ✓ If you purchased health insurance through the marketplace:
 - ✓ Form 1095-A
- ✓ If you have paid tuition for higher education:
 - ✓ Form 1098-T
- ✓ If you are a victim of identity theft:
 - ✓ Your current year IP-PIN (assigned by IRS)
- ✓ Any other tax-related information

To participate, you need the following:

- ✓ Income of equal to or less than:
 - ✓ **\$56,000** for single filers
 - ✓ **\$80,000** if you have dependents*
*income can be up to \$84,000 for Facilitated Self Filing only
- ✓ An **appointment** for tax preparation
- ✓ A **valid** email address

Questions? Email support at:
TaxSupport@singlestop.org



800-290-7189

phone support is also available

