

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 \$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