

Before you start to prepare your income tax return, review the following checklist. Highlight or check the areas that apply to you, and make sure you have that documentation to send to us via our secured email. virtualfiling@evolutiontaxcenter.com

Personal information

This information tells the IRS exactly who's filing, who is covered in your tax return, and where to deposit your tax refund.

- Social Security number for the taxpayer, spouse, and any dependents.
- A copy of your prior year tax return.
- Bank account number and routing number if you would like your refund to be directly deposited.
- Driver's license for taxpayer and spouse.
- Proof of Health Insurance.

Income documents

The income documents needed are ones received by the taxpayer and spouse if filing jointly.

- W2, 1099-MISC, 1009-C, 1099-G, 1099-R, SSA-1099, 1099-INT, 1099-DIV, 1099-S, K1
- Miscellaneous income such as: jury duty, gambling winnings, medical savings account
- Alimony received
- Rental Property income
- Royalties

Adjustments to Income

These items can help the amount of income that is taxed. While these items may not increase your tax refund.

- 1098-E
- 1098- Mortgage interest statement
- Records of IRS contributions
- Receipts of qualified energy-efficient home upgrades
- Records of Health Savings Account contributions
- Alimony paid

Deductions and credits

The government offers several deductions and credits that you may qualify for. These will help increase your tax refund and decrease your tax liability.

- Child Care cost
- 1098-T College Tuition Expense
- Adoption Cost

