



JC Professional Corporation

"Authorized to practice public accounting
by the Chartered Professional Accountants
of Ontario"

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US tax Return Check list and Link

<https://www.irs.gov/filing/gather-your-documents>

Personal information

- [Social Security number](#) or [individual tax ID number \(ITIN\)](#) for you and [anyone else on your return](#)
- Bank account and routing numbers to [get a refund by direct deposit](#) or [pay taxes you owe](#)
- Your [adjusted gross income \(AGI\)](#) and exact refund amount from last year's tax return, if you filed.
- Your name on record with the Social Security Administration (SSA) — [notify SSA if you changed your name](#)
- Your current address — [notify the IRS if you changed your address](#)
- If you e-filed last year, your [self-select PIN](#)
- Your [IP PIN](#) if you received one from the IRS

Income documents

- Paycheck stubs
- Statements from banks, payment apps or online marketplaces
- Checks paid to you
- Records of [digital asset transactions](#)

Forms W-2, 1099 or other information returns

People or organizations that paid you during the year are required to report the payments to the IRS on an information return. They must file these forms with the IRS and send a copy to you. You should get them electronically or by mail in January or February.

These forms report income you received during the year:

- [Forms W-2](#) or a [corrected W-2](#) show your wages from employers. Here's [what to do if you didn't get a W-2](#).
- [Form W-2G](#) for [lottery and gambling winnings](#)

Forms 1099 show other types of income. The most common are:

- [Form 1099-K](#) for payments from [payment cards and online marketplaces](#)
- [Form 1099-G](#) for government payments such as [unemployment benefits](#)
- [Form 1099-INT](#) from banks and brokers showing [interest you received](#)
- [Form 1099-DIV](#) for [dividends and distributions](#) paid to you
- [Form 1099-NEC](#) for freelance and independent contractor work in the [gig economy](#)
- [Form 1099-R](#) for [retirement plan distributions](#) or [pensions or annuities](#)
- [Form SSA-1099](#) for Social Security benefits
- [Form 1099-MISC](#) for other miscellaneous income
- [Form 1095-A, Health Insurance Marketplace Statement](#), lets you [reconcile](#) advance payments or claims
- Records of [digital asset transactions](#) if you did not receive an information return for those

Documents for credits or deductions

- Childcare or dependent care expenses
- Home mortgage and property tax records (if you [itemize](#) your deductions)
- Donations to charity (if you itemize your deductions)
- Health savings account or flexible spending account contributions
- Healthcare expenses (if you itemize. [Special rules](#) apply)
- Retirement contributions
- If you're a student or teacher, receipts for books, tuition and other education expenses

Documents from side jobs and self-employment

- Statements from banks, payment apps, card processors or online marketplaces

- Checks paid to you
- Receipts and mileage logs for [travel, gift and car expenses](#)
- Records of deductible office expenses
- Estimated tax payments
- Other business income and expense records

[Find more self-employment records you should keep](#)