

Tax Documents To Bring With You TY2015

(Not all will apply to every taxpayer)

Both spouses must be present to sign electronic filing form.

Photo ID

Last year's federal and state tax returns

Social Security cards for dependents and spouse*

**Year-end Social Security SSA-1099R form is sufficient substitute*

All year-end tax statements

W2 Wages and final December pay stubs from all employers

Interest and Dividends (year-end 1099 statements)

Social Security SSA-1099R

Pensions and annuities 1099R

IRA and 401K withdrawal 1099R

Broker stock/bond sale 1099B statements

Health Insurance information (new for 2015*)

Coverage cards/documents for you, spouse and dependents, including

NJ Family Services card if applicable

Form 1095A (if obtained Marketplace/Exchange health coverage)

*Form 1095B (if received from health insurance company)

*Form 1095C (if received from employer)

Health care exemptions, if any, received from IRS or Marketplace

Itemized deduction payment records

Real estate taxes

PTR and Homestead Rebate amounts received

Mortgage interest

Medical expenses including health insurance premiums

Prescription drug cost summary from pharmacy provider

PTR Blue Booklet (with property tax page completed by Township Tax Dept. before your appointment)

Blank check if you want direct deposit of your refund

Less common:

Day care expenses paid and provider tax ID number, name, address

Estimated taxes paid records, checkbook, etc.

Long-term care insurance premiums

Residential energy credit receipts and certification

Any notices from the IRS or NJ that changed your tax liability