My Tax Checklist

If you enrolled in a health plan through the Health Insurance Marketplace, you’ll get Form 1095-A in the mail from the Marketplace by early February. Bring it to your tax appointment along with your W-2s and other tax records. Check this list for reminders about some of the information you’ll need or ask your tax preparer before your appointment.

Information for each household member

☐ Last year’s tax return
☐ Social Security Number (SSN)
☐ Date of birth
☐ Child care records, including the provider’s ID number
☐ Alimony that was paid, and the ex-spouse’s SSN

Income & tax information for the tax year

☐ Your Form 1095-A from the Marketplace
☐ W-2 forms from all employers
☐ 1099 forms showing interest, refunds, credits, or other payments you received
☐ Information about any self-employment income
☐ Receipts for your small business, if you have one
☐ Receipts from rental, real estate, royalties, partnerships, S corporation, and trusts
☐ Unemployment compensation
☐ Social Security benefits
Deductions, adjustments & tax credits for the tax year

- 1098 forms or other mortgage statements
- Expenses like self-employment, education, and child care
- Real estate and personal property taxes
- IRA contributions, or other retirement saving contributions
- Expenses, like adoption, medical, or certain education costs
- Employee business expenses

For more information:

- Visit IRS.gov/freefile or IRS.gov/VITA
- Visit HealthCare.gov/taxes.
- Call the Marketplace Call Center at 1-800-318-2596.
- TTY users can call 1-855-889-4325.