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 (for divorces and separations finalized before January 1, 2019), 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.