



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](https://irs.gov/freefile) or [IRS.gov/VITA](https://irs.gov/VITA).
- Visit [HealthCare.gov/taxes](https://healthcare.gov/taxes).
- Call the Marketplace Call Center at 1-800-318-2596.
- TTY users can call 1-855-889-4325.

You have the right to get Marketplace information in an accessible format, like large print, Braille, or audio. You also have the right to file a complaint if you feel you've been discriminated against. Visit [CMS.gov/about-cms/agency-information/aboutwebsite/cmsnondiscriminationnotice.html](https://cms.gov/about-cms/agency-information/aboutwebsite/cmsnondiscriminationnotice.html), or call the Marketplace Call Center at 1-800-318-2596 for more information. TTY users can call 1-855-889-4325.

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