



United Way of
Collier and the Keys

TIPS AND CHECKLIST FOR FILING YOUR 2021 INCOME TAX RETURN

PLAN AHEAD!

It's never too early to get ready for the tax-filing season ahead.
For more tips and resources, check out the [Get Ready](#) page on IRS.gov.

FOR YOUR 2021 INCOME TAX FILING, YOU MAY NEED TO BRING ANY/ALL OF THE FOLLOWING:

- Any correspondence received from the IRS in 2021
- Proof of identification (photo ID)
- Social Security cards for you, your spouse, and dependents
- An Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted for you, your spouse, and your dependents if you do not have a Social Security number
- Proof of foreign status, if applying for an ITIN
- Birth dates for you, your spouse, and dependents on the tax return
- Wage and earning statements (**Form W-2, W-2G, 1099-R, 1099-Misc**) from all employers
- Interest and dividend statements from banks (**Forms 1099**)
- Health Insurance Exemption Certificate, if received
- A copy of last year's federal and state returns, if available
- Proof of bank account routing and account numbers for direct deposit such as a blank check
- To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms
- Total paid for daycare provider and the daycare provider's tax identifying number such as their Social Security number or business Employer Identification Number
- **Forms 1095-A, B and C**, Health Coverage Statements
- Copies of income transcripts from IRS and state, if applicable
- Filing electronically with direct deposit and avoiding a paper tax return is more important than ever this year.
- If you received an **Economic Impact Payment** or an advance **Child Tax Credit** last year, make sure to report the correct amount on your tax return
- Watch for IRS letters about
 - Advance Child Tax Credit payment
 - Third Economic Impact payments - providing this information when preparing a tax return electronically can reduce errors and avoid delays in processing.