

As Tax Day approaches, it's important to have all your documents ready. This checklist is tailored to help you, as a Veteran, gather everything you need to file your taxes efficiently and accurately. If you're just getting started, no worries—this guide is here to simplify the process for you.

1 ESSENTIAL DOCUMENTS

- Social Security numbers for you, your spouse, and any dependents.
- Bank account information for direct deposit of your refund.
- Will you be able to continue your current lifestyle comfortably?

2 INCOME DOCUMENTATION

- W-2 forms from all employers.
- 1099 forms if you're self-employed or have other income such as rent, dividends, interest, and pensions.
- SSA-1099 for Social Security benefits received.

3 EXPENSE RECORDS- (Receipts for any qualifying deductions including):

- Medical and dental expenses.
- Property taxes and mortgage interest.
- Educational expenses.
- Records of charitable donations: cash amounts and descriptions of donated property.

4 CREDITS AND DEDUCTIONS

- Childcare expenses: provider's name, address, and tax ID.
- Educational expenses: Form 1098-T from educational institutions, receipts related to educational expenses.
- Homebuyer credits: HUD-1 settlement statement if you purchased a home.

5 VETERAN SPECIFIC

- Record of any moving expenses if you relocated due to a permanent change of station.
- Documentation of any combat pay, grants, or benefits received related to your service.

6 ADDITIONAL TIPS:

- **Double-Check:** Before you file, double-check that all numbers on your forms match your records.
- **Electronic Filing:** Consider e-filing to reduce errors and get your refund faster.
- **Tax Software:** If using tax software, ensure it is updated to the latest version for accurate processing.

FINAL REMINDER

Make sure everything is signed, dated, and that you keep copies of what you file for your records. If you're uncomfortable or unsure about filing on your own, don't hesitate to seek assistance from a tax professional who understands the specific needs of Veterans.