

Reduce Stress and make the most of your tax refund

Tax time doesn't have to be stressful, and it can help you reach *your* money goals.

- Being organized and prepared using [this checklist](#) can make the process smoother
- High-quality free tax preparation from IRS-certified volunteers is available. Find out more at <https://www.irs.gov/individuals/free-tax-return-preparation-for-qualifying-taxpayers>.
- Remember, e-file and direct deposit are the fastest ways to get your entire refund.

What to bring

<p>Tax documents</p> <p>Avoid multiple trips by bringing your important papers and information when you meet with your tax preparer.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Photo ID <input type="checkbox"/> Social Security cards or verification letter, or Individual Taxpayer Identification Number (ITIN) assignment letter, for all family members <input type="checkbox"/> W-2 forms for all jobs worked in January through December of last year <input type="checkbox"/> Form 1099-SA if you received Social Security payments. <input type="checkbox"/> Form W-2G and other 1099 forms <input type="checkbox"/> Form 1099-G for unemployment and state or local tax refunds <input type="checkbox"/> Self-Employed, contract or gig work? Provide income sources and work-related expenses, plus any 1099-Ks or 1099-NC you received. <input type="checkbox"/> Childcare provider name, address, and tax ID number, and the amount paid in January through December of last year <input type="checkbox"/> Copy of last year's state and federal tax returns <input type="checkbox"/> Other applicable tax-related documents, such as interest statements, federal loan documents, retirement statements, a list of organizations to which you made charitable donations, etc. <input type="checkbox"/> Any letters, correspondence, or other documents sent to you by the IRS or your state tax administration <input type="checkbox"/> Forms 1095-A, B, or C, Affordable Health Care Statements, or health insurance exemption certificates
<p>Avoid Delays with Direct Deposit</p> <p>Paper checks from the IRS may take over 6 weeks to arrive in the mail in 2026. Direct Deposit and e-file are the fastest ways to get your entire refund.</p>	<p>Account and Routing numbers for at <u>least one</u> of the following:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Checking or Savings Account at a bank or credit union, <input type="checkbox"/> Prepaid card – Check the website listed on your card for deposit instructions. <input type="checkbox"/> Mobile Apps used for sending and receiving money <p>There are options like retirement accounts and U.S. Savings Bonds.</p>
<p>Important Information:</p> <p>Taxpayers with Tips, Overtime, Rideshare income, and kids under 18.</p>	<ul style="list-style-type: none"> • If you were paid tips or overtime, it may not be taxable. Please review our explanation at (location) or IRS.gov • If you have a child under 18, you may open a “Trump Account” for them when filing your taxes. Some children will receive a \$1000 in their accounts. Please review our explanation at (location) or https://www.trumpaccounts.gov/ • Rideshare workers should check out, and other gig workers should check out. https://www.taxoutreach.org/rideshare/