

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, 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

Help is available

You may be able to get free help with filling out your taxes, like free access to tax software programs, or free in-person assistance. Visit [IRS.gov/freefile](https://www.irs.gov/freefile) or [IRS.gov/VITA](https://www.irs.gov/VITA).

For more information about how your Marketplace coverage will affect your taxes, visit [HealthCare.gov/taxes/](https://www.healthcare.gov/taxes/) or call the Marketplace Call Center at 1-800-318-2596 (TTY: 1-855-889-4325). If you have questions about your taxes, or want to learn more about the fee for not having health coverage, visit [IRS.gov](https://www.irs.gov).

