



# 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

### For more information:

- Visit [IRS.gov/freefile](https://www.irs.gov/freefile) or [IRS.gov/VITA](https://www.irs.gov/VITA)
- Visit [HealthCare.gov/taxes](https://www.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://www.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.

