



Your Tax Prep Checklist

LGFCU is here to help you tackle your taxes. To get a grip on filing your return, start by gathering these items:

Personal info

- Prior year tax returns: Federal and, if applicable, State
- Social Security numbers for yourself and all dependents

Income

- W-2 form(s)
- 1099 form(s)
- Documentation of other income

Credit and deduction documentation

- Property taxes paid: Home and auto
- Mortgage loan interest paid
- Medical expenses paid
- Retirement account contributions
- Charitable contributions
- Health Insurance Marketplace Statement, Form 1095-A (if you had health insurance through the Marketplace)
- Form 1098-T and other higher education expenses including tuition and student loan interest paid
- Day care expenses and the day care provider's name, address and tax ID number

For more tips, including information about our low-cost tax preparation service*, visit lgfcu.org/taxprep or your local branch today.

* Eligible members can have a basic income tax return prepared and filed in any branch for a fee of \$95.