



# 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. You'll use it when you file your taxes, so store it in a safe place and bring it to your tax appointment along with your W-2s and other tax records. Here's what else you may need when you file:

## 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 (for divorces and separations finalized before January 1, 2019), and the ex-spouse's SSN

## Income & tax information for the tax year

- ☐ Form 1095-A from the Marketplace
- ☐ W-2 forms from all employers
- ☐ 1099 forms showing interest, refunds, credits, or other payments
- ☐ Information about any self-employment income
- ☐ Receipts for your small business
- ☐ 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, child care, adoption, and medical
- ☐ Real estate and personal property taxes
- ☐ IRA contributions or other retirement saving contributions
- ☐ 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) for the steps and tax forms you'll need based on your insurance status.
- Call the Marketplace Call Center at **1-800-318-2596**. TTY users can call 1-855-889-4325.

## How can I learn more?

To learn more about coverage through the Marketplace or your benefits and protections, visit **HealthCare.gov** or call the Marketplace Call Center at 1-800-318-2596. TTY users can call 1-855-889-4325.

You have the right to get your 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/Web-Policies-Important-Links/Accessibility-Nondiscrimination-Disabilities-Notice](https://www.cms.gov/About-CMS/Web-Policies-Important-Links/Accessibility-Nondiscrimination-Disabilities-Notice) or call 1-800-318-2596. TTY users can call 1-855-889-4325.

## Health Insurance Marketplace

CMS Product No. 11894  
November 2024

This product was produced at U.S. taxpayer expense.

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