

Documentation to Include

You must provide documentation to the Assessor for all income received by you, your spouse/domestic partner, and any co-tenants

Proof of Income

Federal Tax Forms

If you filed a federal tax return, provide a complete copy including, but not limited to, all of the following forms or schedules that are part of your federal return.

- IRS Form 1040, 1040A, or 1040EZ
- Schedule B – Interest & Ordinary Dividends
- Schedule C – Profit & Loss from Business
- Schedule D – Capital Gains & Losses
- Schedule E – Supplemental Income & Loss
- Schedule F – Profit & Loss from Farming
- Form 1116 – Foreign Tax Credit
- Form 4797 – Sales of Business Property
- Form 6252 – Installment Sale Income
- Form 8829 – Expenses for Business Use of your Home
- Social Security Statement (generally, SSA 1099)
- K-1's

Non-IRS Filers

If you do not file an IRS return, you must provide documentation of all income received by you, your spouse/domestic partner, and any co-tenants.

Other Documents

Include copies of standard federal forms and documents used by others to report income they paid out including, but not limited to, the following:

- W-2's – Wage & Tax Statement
- W-2-G – Certain Gambling Winnings
- 1099's:
 - 1099-B – Proceeds from Broker & Barter Exchange
 - 1099-Div – Dividends & Distributions
 - 1099-G – Unemployment Compensation, State & Local Income Tax Refunds, Agricultural Payments
 - 1099-Int – Interest Income
 - 1099-Misc – Contract Income, Rent & Royalty Payments, Prizes
 - 1099-R – Distributions from Pensions, Annuities, IRA's, Insurance Contracts, Profit Sharing Plans
 - 1099-S – Proceeds from Real Estate Transactions
 - RRB-1099 – Railroad Retirement Benefits
 - SSA-1099 – Social Security Benefits

Other Income Sources

If you have income from other sources and you did not receive a W2 or 1099 for the income you received, provide the following:

- Disability income (for example: L&I pension)

- A statement from the organization that issued the payments; and/or
- Copies of monthly bank statements with a statement describing the type of income received (e.g. tips, cash earned from yard sales or odd jobs, rental income, groceries purchased in return for a room in your house, etc.)

Proof of Expenses

Provide documentation for all allowable out-of-pocket expenses that were not reimbursed by insurance or a government program. Provide a copy of an invoice, bill, or explanation of benefits if you or your spouse/domestic partner paid for any of the following:

- Living in a nursing home, assisted living facility, or adult family home
- Prescription drugs
- In-home care
- Premiums for Medicare Parts A, B, C, & D
- Premiums for Medicare supplemental policies (Medigap)*
- Durable medical and mobility enhancing equipment
- Prosthetic devices*
- Medically prescribed oxygen*
- Long-term care insurance*
- Cost-sharing amounts (amounts applied to your health plans out of pocket maximum amount)*
- Medicines of mineral, animal, and botanical origin if prescribed, administered, dispensed, or used in treatment by a WA licensed naturopath*
- Ostomy items*
- Insulin for human use*
- Disposable devices used to deliver drugs for human use*

** New for the 2022 tax year*

Proof of Age or Disability and Proof of Ownership and Occupancy

You must provide documentation to the Assessor demonstrating you meet the age or disability, ownership, and occupancy requirements such as:

- Copy of driver's license or state issued photo id
- Copy of voter registration
- If eligibility is based on a disability, copy of disability award letter from SSA or VA, or a Proof of Disability statement completed and submitted by your physician
- Complete copy of trust documents, if applicable
- Any other documents the Assessor requests