

TAX PREP CHECKLIST

PERSONAL INFORMATION

- Name, Address, and Social Security Number (SS#)
- Your spouse's full name and SS#
- Alimony paid & full name and SS# of ex-spouse
- Proof of health insurance (Form 1095-A, 1095-B, 1095-C)

INFORMATION FOR OTHERS ON RETURN

- Dates of birth and SS#s
- Childcare records including tax ID of childcare provider
- Income of other adults in your home
- Form 8332 showing custodial parent is releasing their right to claim a child to you (if applicable)

EMPLOYEE INFORMATION

- Form W-2

RETIREMENT INCOME / IRA INFORMATION

- Pension / IRA annuity income (Form 1099-R)
- Social Security information (Form 1099 SSA)
- Form 5498 showing IRA contributions

SAVINGS & INVESTMENTS

- Investment & dividend income (1099-INT, 1099-DIV, 1099-OID)
- Income from sales of stock or other property (1099-B, 1099-S)
- Dates of acquisition and records showing cost basis of property sold if not reported on 1099-B

RENTAL PROPERTY INCOME

- Records of income and expenses
- Rental asset information (cost, date placed in service, etc)

SELF-EMPLOYMENT INFORMATION

- Forms 1099-Misc and K-1
- Records of all expenses

OTHER DEDUCTIONS AND CREDITS

- Mortgage interest statement (Form 1098)
- Real estate and personal property tax records
- Records of charitable contributions (church, 501c(3), etc.)
- Records of non-cash donations (Am-Vets, Goodwill, etc)
- Amounts paid for healthcare, insurance, doctors, etc
- Miles driven for charitable or medical purposes
- Records of energy-saving home improvements
- HSA contributions (Form 5498-SA)
- Records of estimated tax payments made

EDUCATION PAYMENTS

- Forms 1098-T from educational institutions
- Summary of all itemized education expenses
- Records of any scholarships received
- Forms 1098-E if you paid interest on student loans

OTHER INCOME

- Unemployment income
- State tax refund (Form 1099-G)
- Amount of alimony received
- HSA & long-term care reimbursement (1099A, 1099-LTC)
- Jury duty records
- Hobby income and expenses / prizes and awards