

# TAX PREP CHECKLIST

## PERSONAL INFORMATION

- Name, Address, & Social Security Number (SS#)
- Your Spouse's Full Name & SS#
- Alimony Paid: Full Name & SS# of Ex-Spouse
- Proof of Health Insurance ( Form 1095-A, 1095-B, 1095-C)

## INFORMATION FOR OTHERS ON RETURN

- Dates of Birth(s) 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)

## 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 & Records Showing Cost Basis of Property Sold if not Reported on 1099-B

## RENTAL PROPERTY INCOME

- Records of Income & Expenses
- Rental Asset Information (cost, date placed in service, etc)

## SELF-EMPLOYMENT INFORMATION

- Forms 1099-Misc & Schedules K-1
- Records of All Expenses
- Business Use of Vehicle: Log of Miles & Business Purpose

## OTHER DEDUCTIONS AND CREDITS

- Mortgage Interest Statement (Form 1098)
- Real Estate Tax Records
- Invoice Showing Vehicle Sales Tax paid
- Records of Charitable Contributions (church, 201C-3, etc)
- Records of Non-Cash Donations (Am-Vets, Good Will, St Vincent, Easter Seals, etc)
- Amounts Paid for Healthcare, Insurance, Doctors, etc
- Miles Driven for Charitable or Medical Purposes
- Records of Energy-Saving Home Improvements
- Record of Moving Expenses not Reimbursed by Employer
- Records of Estimated Tax Payments Made

## EDUCATION PAYMENTS

- Forms 1098-T from Educations Institutions
- Summary of all Itemized Education Expenses
- Records of any Scholarships Received
- Forms 1098-E: Interest Paid on Student Loans

## OTHER INCOME

- Unemployment Income
- State Tax Refund (Form 1099-G)
- Alimony: Amount Received
- Long-Term Care Reimbursement (1099A, 1099-LTC)
- Jury Duty Records
- Hobby Income and Expenses
- Prizes and Awards
- Forms 1099-C: Cancellation of Debt
- Forms 1099-A: Abandonment of Secured Property
- Repayments