



## Tax Preparation Checklist

Below is a checklist to assist you in gathering all the important tax records and tax documents you need to prepare and efile your Federal and State Tax Returns efficiently and more effectively.

**PLEASE PRINT THE TAX LIST BELOW, LOOK IT OVER, AND CHECK OFF THOSE ITEMS YOU HAVE HANDY FOR YOUR TAX RETURN.**

### PERSONAL INFORMATION

- Social security number & drivers license for you and your spouse
- Alimony paid plus full name and social security number
- Previous three years of tax returns (if applies)

### INFORMATION ABOUT OTHER PEOPLE WHO MAY BELONG ON YOUR RETURN

- Dates of birth and social security numbers
- Childcare records (including the provider's tax ID number)
- Income of other adults in your home

### EDUCATION PAYMENTS

- Forms 1098-T from educational institutions
- Receipts that itemize qualified educational expenses
- Records of any scholarships or fellowships you received
- Form 1098-E if you paid student loan interest

### EMPLOYEE INFORMATION

- Forms W-2

### SELF-EMPLOYMENT INFORMATION

- Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s
- Records of all expenses — check registers or credit card statements, and receipts
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Office in home information, if applicable

### BUSINESS USE OF VEHICLE INFORMATION

- Log showing total miles driven for the year (or beginning/ending odometer readings), total business miles driven for the year (other than commuting), and the business purpose of the mileage
- Amount of parking and tolls paid

### RENTAL PROPERTY INCOME

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

### RETIREMENT INCOME AND CONTRIBUTIONS

- Pension/IRA/annuity income (1099-R)
- Social security/RRB income (1099-SSA, RRB-1099)
- Form 5498 showing IRA contributions
- Traditional IRA basis (i.e. amounts you contributed to the IRA that were already taxed)

## **SAVINGS AND INVESTMENTS**

Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)  
Income from sales of stock or other property (1099-B, 1099-S)  
Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)

## **OTHER INCOME**

Unemployment, state tax refund (1099-G)  
Gambling income (W-2G as well as expense records)  
Amount of any alimony received  
Health Savings Account (1099-SA or 1099-LTC)  
Jury duty records  
Hobby income and expenses  
Prizes and awards  
Other 1099

## **AFFORDABLE CARE ACT**

Marketplace (Exchange)  
Form 1095-B and/or 1095-C if you had insurance coverage through any other source (i.e. an employer, insurance company Medicare, Medicaid, CHIP, TRICARE, VA, etc.)  
Marketplace exemption certificate

## **OTHER DEDUCTIONS AND CREDITS**

Receipts for classroom expenses (for educators in grades K-12)  
Form 5498-SA showing HSA contributions  
All other 5498 series forms (5498-QA, 5498-ESA)  
Record of moving expenses not reimbursed by employer  
Forms 1098 or other mortgage interest statements  
All other 1098 series forms  
Amount of state/local income tax paid  
Real estate and personal property tax records  
Invoice showing amount of vehicle sales tax paid  
Cash amounts donated  
Records of non-cash charitable donations (GoodWill)  
Amounts paid for healthcare insurance and to related expenses  
Amounts of miles driven for charitable or medical purposes  
Expenses related to your investments  
Amount paid for preparation of last year's tax return  
Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)  
Job-hunting expenses  
Receipts for energy-saving home improvements  
Record of estimated tax payments made



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