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# Tax Preparation Checklist

**Personal information:**

Has anything changed since last year? Did you get married? I'll need your new spouse's photo ID, SSN, and birthdate. Did your new spouse change their name on their SS card? When did you get married?

Did you get divorced? What was the date?

Did a spouse die? What was the date of their passing?

Did you have a new child? Need their SS# and birthdate (if a child has died, what was the date?)

Did you receive an IP Pin from the IRS?

Did you change bank accounts? Need the new account number and routing # if it's a different bank

**Information about your income:**

- [ ] W-2 forms
- [ ] W-2G forms for gambling winnings
- [ ] 1099-C forms for cancellation of debt
- [ ] 1099-G forms for unemployment, or state or local tax refunds
- [ ] 1099-MISC forms for any miscellaneous compensation (rents, prizes,etc)
- [ ] 1099-NEC forms for any independent contractor work
- [ ] 1099-R, Form 8606 for payments/distributions from IRA's or other retirement
- [ ] 1099-S or 1099-B forms for income from sale of a property (also will need dates of when you purchased the property & when you sold the property, the price you paid for the property, and the total closing costs)

**Information about your income (continued)**

- [ ] 1099-INT, -DIV, -B, or K-1 Forms for investment or interest income
- [ ] SSA-1099 for Social Security benefits received
- [ ] Alimony received (& date of divorce)
- [ ] Business or farming income – Profit & Loss statement, capital equipment information
- [ ] Rental property income and expenses; Profit/Loss statement
- [ ] Miscellaneous income; jury duty, scholarships, etc.

**Adjustments to your income:**

The following items can help reduce the amount of your income that is taxed, which can increase your tax refund, or lower the amount you owe.

- [ ] Form 1098-E for student loan interest paid (or loan statements for student loans)
- [ ] Form 1098-T for tuition paid (or receipts/canceled checks for tuition paid for post-high school)
- [ ] For teachers: Canceled checks or receipts for expenses paid for classroom supplies, etc. (up to $300
- [ ] Records of IRA contributions made during the year
- [ ] Receipts for any qualifying energy-efficient home improvements (solar, window, etc)
- [ ] Records of Medical Savings Account contributions
- [ ] Self-employed health insurance payment records
- [ ] Records of moving expenses (Only if in the military!)
- [ ] Alimony paid (date of divorce)
- [ ] Keogh, SEP, Simple, and other self-employed pension plans

**Deductions & Credits:**

Uncle Sam offers a number of deductions & credits to help lower your tax bill, which means more $ in your pocket!  You'll need the following documentation to make sure you get all the deductions & credits you deserve:

- [ ] Child care costs :provider's name, address, tax ID, and amount paid
- [ ] Education costs: Form 1098-T, education expenses
- [ ] Adoption costs: SSN of child; records of legal, medical, & transportation costs, court costs, attorney fees
- [ ] Forms 1098: Mortgage interest, private mortgage insurance (PMI), and points you paid

**Deductions & Credits (continued)**

- [ ] Investment interest expenses
- [ ] Charitable donations: cash amounts, official charity receipts, canceled checks; value of donated property (such as a car); miles driven & out-of-pocket expenses
- [ ] Medical & dental expense records (includes pharmacy, medical supplies); mileage
- [ ] Casualty & theft losses: amount of damage, insurance reimbursements
- [ ] Records of home business expenses, home size/office size if it's a new business, home expenses (utilities, repairs/maintenance to the general structure of the home & to the home office, home-owner's insurance, home warranties, HOA fees)
- [ ] Rental property income/expenses; profit/loss statement

**Taxes you've paid**

- [ ] State & local income taxes paid
- [ ] Property taxes paid
- [ ] Personal property taxes
- [ ] Vehicle license fees based on value of vehicle (including ATVs, RVs, etc)
- [ ] Sales tax on large ticket items (car/boat, RV, etc)

**Other information:**

- [ ] Estimated tax payments made during the year
- [ ] Foreign bank account information: location, name of bank, account number, peak value of account during the year
- [ ] Form 1095-A if you had coverage through the Health Insurance Marketplace
- [ ] Documents from the IRS, Health Insurance Marketplace, your state tax agency, or anything that says "IMPORTANT TAX DOCUMENT"