

Personal Tax Prep Checklist

Personal Information

- Your social security number, full name (as listed with the social security administration) and DOB
- Your spouse's social security number, full name (as listed with the social security administration) and DOB
- Your tax return for the previous year (if completed by another tax firm).

Information About Other People Who May Belong on Your Return

- Full names, (as listed with the social security administration) dates of birth and social security numbers
- Childcare records (including the provider's tax ID number) if applicable
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

Income

- Forms W-2 from all employers
- Interest, dividend income statements (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)
- Pension/IRA/annuity income (1099-R)
- Social security/RRB income (1099-SSA, RRB-1099)
- Unemployment, state tax refund (1099-G)
- Gambling income (W-2G or records showing income, as well as expense records)
- Amount of any child support received
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- Hobby income and expenses
- Other 1099s
- 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
- Records of income and expenses
- Rental asset information (cost, date placed in service, etc.) for depreciation



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Income Tax Specialists

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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
- If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

Education Payments

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

Deductions and Credits

- Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Real estate and personal property tax records
- Vehicle registration / excise tax (license plates)
- Forms 1098 or other mortgage interest statements
- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- 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 classroom expenses (for educators in grades K-12)
- Form 5498-SA showing HSA contributions
- Record of moving expenses not reimbursed by employer
- Receipts for energy-saving home improvements
- Record of estimated tax payments made

Taxes can be very complex and as such may require additional information. However our dedicated staff is here to assist you with all your income tax questions. Please contact us if you have any questions about the documents you should bring 317-886-7456