

Tax Preparation Checklist

Personal Information:

☐

Date of birth and Social Security numbers for you, for your spouse, for your children

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Copy of last year's tax return

☐

Bank account number and routing number

Income Information:

☐

W-2 forms

☐

1099 Forms (1099-C, 1099-G, 1099-R, 1099-S, 1099-INT, SSA-1099, 1099-MISC)

☐

Alimony recieved

☐

Business income and expenses

☐

Rental property income and expenses

☐

Miscellaneous income (jury duty, gambling winnings, scholarships, etc)

Income Adjustments:

☐

1098 Forms (1098-E, 1098-T)

☐

IRA contributions

☐

Medical Savings Account (MSA) contributions

☐

Home expenses (energy efficient home improvements, moving expenses)

☐

Self-employed health insurance payments and plans

☐

Alimony paid

Deductions and Credits:

☐

Child care costs (provider name, address, tax ID, and amount paid)

☐

Education costs (Form 1098-T, education expenses)

☐

Adoption costs (SSN of child, legal records, medical costs, transport costs)

☐

Mortgage interest (Form 1098, mortgage insurance)

☐

Investment interest

☐

Charitable donations (cash amount, receipts, checks, value of donations, miles driven)

☐

Medical and dental expenses

☐

Theft and casualty losses (damage amounts, insurance payout amount)

☐

Home business expenses

☐ Rental property income and expenses

☐ Records of other misc tax deductions

Taxes you have paid

☐ State and local income taxes

☐ Real estate taxes

☐ Personal property taxes

☐ Vehicle license fees

☐ Estimated tax payments

Other info

☐ Foreign bank account information

☐ Prior year refund applied to current year
