

Tax Prep

Checklist

For All Filers

- ☐ Copy of Last Year's Tax Return
- ☐ Social Security Numbers (yourself, spouse & dependents)
- ☐ Dates of Birth (yourself, spouse, & dependents)
- ☐ Bank Accounts/Routing #s
- ☐ Loan Statements

Income

- ☐ W-2s
- ☐ 1099s for All Forms of Income

Home & Rental Properties

- ☐ 1098s: Interest on Mortgage, Equity or Student Loans
- ☐ Paid Real Estate Taxes
- ☐ Insurance Premiums
- ☐ Energy Efficient Upgrade Receipts
- ☐ Rental Income
- ☐ Mileage & Receipts for Rental Repairs & Upgrades

Donations

- ☐ Charitable Contribution Receipts
- ☐ Volunteer Expense Deductions

Business Owners

- ☐ Tax ID
- ☐ Insurance Premiums & Expenses
- ☐ Business Income & Expenses
- ☐ List of Assets & Equipment
- ☐ Mileage Logs

Deductions

- ☐ Medical/Dental Expenses
- ☐ Health Insurance Payments
- ☐ IRA and HSA Contributions
- ☐ Vehicle Purchase Sales Tax
- ☐ Childcare Expenses
- ☐ Job Search Expenses
- ☐ Moving Expenses
- ☐ Amount Paid for Last Year's Tax Prep
- ☐ Educational Expenses (Loan Interest, Supplies, Tuition)

Other Miscellaneous

- ☐ Estimated Tax Payments (self-employed)
- ☐ IRA/401K Total Contributions