

# 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