



TAX PREPARATION CHECKLIST

PERSONAL INFORMATION

For you, your spouse and your dependents. (Additional space on back of form)

- | | |
|--|---|
| <input type="checkbox"/> Full Legal Name: _____ | <input type="checkbox"/> Date of birth: _____ |
| <input type="checkbox"/> Soc. Sec. # or Tax ID#: _____ | <input type="checkbox"/> Copy of Last Year's Tax Return |

INCOME

How did you make money this year? Gather the documents that apply to your situation.

- | | |
|--|---|
| <input type="checkbox"/> Personal Income Statements
W-2 for each job held during the tax year by you, your spouse and any dependents.
Self-employed? All financial records, as well as all Forms 1099-MISC. | <input type="checkbox"/> Unemployment Compensation and State Tax Refunds
Form 1099-G |
| <input type="checkbox"/> Investment or Interest Income Statements
Forms 1099-INT, 1099-DIV, 1099-OID and 1099-B, as well as the Schedule K-1. | <input type="checkbox"/> HSA and Long-Term Care Reimbursements
Forms 1099-SA and 1099-LTC |
| <input type="checkbox"/> Pension/IRA/Annuity Income
Form 1099-R | <input type="checkbox"/> Social Security/RRB Income
Forms SSA-1099 and RRB-1099 |
| <input type="checkbox"/> Income From Home or Property Sale
Form 1099-S | <input type="checkbox"/> Trust and Estate Beneficiary Earnings
Form 1041 |

Running a Small Business? Are you an LLC or S-CORP?

DEDUCTIONS

Make sure you don't miss out on deductions and credits you qualify for.



Do you own a house?



Did you pay for childcare?



Did you contribute to an IRA or Health Savings Account?



Did you have a big life change this year?

Check out some common options on the back.

**New rules? Old rules? Get in touch to set up a meeting.
We've got you covered.**

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COMMON DEDUCTIONS

Do you qualify for any of these deductions? Here's what you'll need if you do.

- Homeowner Expenses
Mortgage interest statements (Form 1098), property tax payment receipts, energy efficient upgrade receipts (Form 5695) and qualified moving expense receipts for work-related moves more than 50 miles.
- Education Expenses
Tuition statements, itemized receipts of qualified educational expenses (Form 1098-T) and student loan interest statements (Form 1098-E).
- Charitable Contributions
Detailed list of donations, receipts for contributions over \$250 and Form 1023 for vehicle donations.
- Self-Employment Expenses
Records of business/home-office expenses, assets, pension plan contributions, health insurance payments and estimated tax payment receipts (state and federal).
- Child and Dependent Care Expenses
Name, address and tax ID or Social Security number of the provider.
- Health Care Expenses
Records of medical and dental costs.
- Alimony Expenses
Your ex spouse's full name and Social Security number.
- Job Hunting and Job-Related Educational Expenses
Records of expenses
- IRA Contributions
Form 5498
- Health Savings Account Contributions
Form 5498-SA
- Tax Payments
Receipts for all state and federal taxes, property taxes, vehicle license fees and sales tax.
- Tax Preparation Expenses
Receipt for having last year's taxes professionally prepared.

Additional Dependant Info:

Full Legal Name: _____ Date of Birth: _____ Soc. Sec #: _____ Relationship: _____

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