

Tax Filing Season - Tax Preparation Document Checklist

Use this list to help you get organized for tax time. This checklist will also help you to save a lot of money on your tax liabilities as well as potentially help you maximize any tax refund you may be entitled to.

GENERAL INFORMATION

- Two forms of Identification (Photo ID and IE: Social Security Card or ITIN card)
- Copy of Last Year's Tax Return (Mainly for new clients. If you are a returning client, this should already be on file.)
- Information about your health insurance coverage or non coverage for you, your spouse if applicable and every dependent you claim.
- Dates of Birth and Social Security Numbers for You and Your Spouse if applicable.
- Dependent's Full Names, Dates of Birth, and Social Security Numbers (two forms of identification for each dependent)
- Educational expenses (college level or trade school) for You, Your Spouse, and any Dependents you claim.
- Personal Identification Number assigned by the IRS (mostly given to taxpayers who previously had identify theft on a prior tax return filing)
- Routing Number and Account Number (if you want to receive your refund by Direct Deposit)

INCOME INFORMATION

- W-2 Form from all jobs you worked
- Form 1099-MISC if you did work as an Independent Contractor
- Form 1099-INT (Interest Income)
- Form 1099-DIV (Dividend Income)
- Form 1099-B (Sales of Stock, etc)
- Form 1099-G (State Tax Refunds: Only needs to be reported if you "Itemized Deductions" the previous year)
- Form 1099-G (also used to report Unemployment Income)
- Form 1099-C (Cancellation of Debt)
- Amount of Alimony Paid or Received

RETIREMENT INCOME

- Form 1099-R (Pensions and/or Annuity Payments received)
- Social Security

BUSINESS INCOME

- Profit & Loss Statement or List of Business Income and Expenses
- Rental Income and Expenses
- Farm Income and Expenses
- Form K-1: Income from Partnerships, Corporations, Trusts, and S Corporations
- # of Miles traveled for Business (Contact us for a list of Expense Categories that you may be able to include for your business)

TAX CREDITS

- Child Care Expenses
- Child Care Provider's Name, Address and Tax ID Number
- Adoption Expenses Paid
- Foreign Taxes Paid

TAX DEDUCTIONS CHECKLIST

- Medical Expenses paid for You, Your Spouse and your Dependents
- Medical Insurance Paid
- Prescription Medication and other Medical Related Expenses ordered by your Physician
- Payments to Doctors and Dentists
- Hospital Payments
- Labs and X-Rays paid
- Miles Traveled for Medical Purposes
- Form 1099 (Mortgage Interest Statement)
- Interest Paid on Second Mortgage
- Real Estate Taxes Paid
- State Taxes Paid through your Wages and/or Additional Payments you paid to your State
- Personal Property Taxes Paid
- Cash Contributions Paid to Charities and Value of non cash donations
- Unreimbursed Expenses for Work
- Miles Traveled for Work (not including round trip from home to your primary place of work)
- Miles Traveled to conduct Charitable Work at a charitable organization
- Casualty and Theft Losses
- Amount paid to have your Tax Returns prepared last year including any DIY software
- Union and Professional Dues Paid
- Investment Expenses
- Job Hunting Expenses
- Student Loan Interest Paid

Moving Expenses

OTHER

Amount paid out in Estimated Taxes last year

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