1979 Hubbard Road | Madison, Ohio 44057
Phone: (440) 983-4001 | Fax: (440) 607-4211 | Mobile/Text: (440) 381-1428
info@kmstax.com | www.kmstax.com

Personal Tax Preparation Checklist

Please include the following information with your tax documents:

☐ Driver's license or State issued ID Card information for taxpayer and spouse (if applicable)
☐ Copy of prior year income tax returns
☐ Bank information for direct deposit of refunds
☐ Social security numbers for all dependents
☐ Dates of birth for all family members/dependents

Please also include any of the following documents that pertain to you:

☐ W2 forms
☐ K1 forms
☐ Self-Employed taxpayers – record of all income & expenses
☐ 1099 forms reporting unemployment compensation
☐ 1099 forms reporting state and local refunds
☐ SSA-1099 forms reporting social security benefits
☐ 1099-R forms reporting IRA or pension distributions
☐ 1099-INT forms for interest income
☐ 1099-DIV forms for dividend income
☐ 1099-B forms & consolidated statements (broker's statements) reporting dividends capital gains, and stock sales for the current tax year as well as the original purchase date and cost information
☐ 1099 forms for all other income, i.e., 1099-MISC, 1099-NEC, etc. (bring all 1099's received)
☐ 5498 forms reporting IRA balances and accounts
☐ Health Savings Account Forms (5498-SA, 1099-SA) for contributions and distributions
☐ 1095-A form – Health Insurance Marketplace Statement
☐ 1098-E forms for student loan interest
☐ 1098-T tuition statements
☐ 1098 Mortgage Interest Statements
☐ Property tax statements for real estate taxes paid during the tax year
☐ Settlement statements for the purchase or sale of real estate
☐ Name, address, and Federal I.D. of childcare providers and amounts
☐ Health insurance premiums, long-term health care premiums, and out-of-pocket medical expenses
☐ Electric Vehicle information for EV Tax Credit, if applicable
☐ Record of estimated tax payments