



TAX & ACCOUNTING SOLUTIONS

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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 return
- Bank information for direct deposit of refunds
- Social security numbers of all dependents
- Dates of birth for all family members

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

- Information regarding stimulus payments received
- W2 forms
- K1 forms
- 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 forms (broker's statements) reporting dividends capital gains, and stock sales for the current tax year as well as original purchase date and cost information
- 1099 forms for all other income (bring all 1099's received)
- 5498 forms reporting IRA balances and accounts
- Health Savings Account Forms (5498-SA, 1099-SA)
- 1095-A form – Health Insurance Marketplace Statement
- 1095-C form – Employer Provided Health Insurance Offer and Coverage
- 1098-E forms for student loan interest
- 1098-T student loan interest and 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
- Out of pocket medical expenses and long-term health care premiums
- Record of estimated tax payments