



WHAT DOCUMENTS DO I NEED BEFORE FILING MY TAXES?

Precision Tax and Immigration Services, LLC is here to help. Use the checklist below to find the tax documents and forms that you will need to get started. You will more than likely not need all of these documents, only the documents that apply to your tax situation.

PERSONAL INFORMATION

- ☐ Prior year tax return for new clients
- ☐ Social Security Number or Individual Tax Identification Number (ITIN)
- ☐ Your spouse's full name, social security number or tax ID number, and date of birth
- ☐ Identity Protection Pin (IP Pin) if one has been issued to you by the IRS
- ☐ Bank routing and account numbers if you choose to receive your refund via direct deposit or pay your balance due via direct debit

DEPENDENT(S) INFORMATION

- ☐ Birth certificates and social security numbers or tax ID numbers for all dependents
- ☐ Childcare records – including provider's tax ID number or SSN if applicable
- ☐ Income for dependents and for all other adults in your household
- ☐ Form 8332 if custodial parent is releasing their right to claim a child to you, the non-custodial parent. (if applicable)

SOURCES OF INCOME

Employed

- ☐ Forms W-2

Unemployed

- ☐ Unemployment (Form 1099-G)

Self-Employed

- ☐ Forms 1099, Schedule K-1, income records to verify amounts not reported on 1099-MISC or 1099-NEC
- ☐ Records of all expenses – check registers or credit card statements and receipts
- ☐ Business-use asset information (cost, date placed in service, etc) for depreciation
- ☐ Office in home information, if applicable
- ☐ Record of estimated tax payments made to the IRS (Form 1040-ES)

Rental Income

- ☐ Records of all income and expenses
- ☐ Rental asset information (cost, date placed in service, etc) for depreciation

Retirement Income

- ☐ Pension / IRA / annuity income (1099-R)
- ☐ Traditional IRA basis (amount you contributed to the IRA that was already taxed)
- ☐ Social security / RRB income (SSA-1099, RRB-1099)

Savings and Investments or Dividends

- ☐ Interest or dividend income (1099-INT, 1099-OID, 1099-DIV)
- ☐ Income from the sale of stock or other property (1099-B, 1099-S)

- ☐ Health Savings Account (HSA) and long-term care reimbursements (1099-SA or 1099-LTC)
- ☐ Cryptocurrency transactions (virtual currency)

Other Income and Losses

- ☐ Gambling income (W-2G) or records showing income and expenses
- ☐ Jury duty records
- ☐ Hobby income and expenses
- ☐ Prizes and awards
- ☐ Trust income
- ☐ Royalties (1099-MISC)
- ☐ Any 1099s received
- ☐ Alimony paid or received (along with ex-spouse's name and SSN)
- ☐ State tax refund

DEDUCTIONS

Home and Vehicle Ownership

- ☐ Mortgage interest statements (Forms 1098)
- ☐ Real Estate / personal property tax records
- ☐ Energy saving home improvement receipts (solar panels, solar water heater etc)
- ☐ Electric vehicle information
- ☐ All 1098 series forms

Charitable Donations

- ☐ Cash amounts donated to charitable organizations (ie schools, church)
- ☐ Records of non-cash donations
- ☐ Miles driven for charitable or medical purposes

Medical Expenses

- ☐ Amounts you paid for healthcare, insurance, and to doctors, dentists, and hospitals
- ☐ Amounts paid for qualified insurance premiums if paid outside of the Marketplace or an employer provided plan

Health Insurance

- ☐ Form 1095A if you had insurance through the marketplace (exchange)

Childcare Expenses

- ☐ Fees paid to a licensed day care center or family day care for care of infant or preschooler
- ☐ Amounts paid to a baby-sitter or provider for care of your child under the age of 13 while you work
- ☐ Expenses paid through a dependent care flexible spending account at work

Educational Expenses

- ☐ Forms 1098-T from educational institutions
- ☐ Receipts that itemize qualified educational expenses
- ☐ Records of any scholarships or fellowships you received
- ☐ Form 1098-E if you paid student loan interest

K-12 Educator Expenses

- ☐ Receipts for classroom expenses (for educators in grades K-12)

State & Local Taxes

- ☐ Amount of state and local income or sales tax paid (other than wage withholding)
- ☐ Invoice showing amount of vehicle sales tax paid and / or personal property tax on vehicles

Retirement & Other Savings

- ☐ Form 5498-SA showing HSA contributions
- ☐ Form 5498 showing IRA contributions
- ☐ All other 5498 series forms (5498-QA, 5498-ESA)

Federally Declared Disaster

- ☐ City/county you lived/worked/had property in
- ☐ Records to support property losses (appraisal, clean-up costs, etc.)
- ☐ Records of rebuilding/repair costs
- ☐ Insurance reimbursements/claims to be paid
- ☐ FEMA assistance information
- ☐ Check the [**FEMA website**](#) to see if your county has been declared a federal disaster area