



TAXPAYER CHECKLIST

Personal Information (Taxpayer and Spouse)

- Driver License or State ID
- Your social security card and tax ID number
- Last Year Tax Return if available.

Dependent(s)

- Social Security Card(s), Birth certificate(s) (if available/know date(s) of birth)
- Childcare records (including the provider's tax ID number/social security number)

Health Insurance Statements

- All Forms 1095-A, B or C, Affordable Health Care Statement

Income for all in household and Expenses

- Forms W-2
- Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s
 - 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 business miles driven for the year
 - Amount of parking and tolls paid
 - other expenses: receipts of estimated tax payments made receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, car registration cost and etc.
- 1099-G (Unemployment, state tax form)

- Rental Property Income Records
 - Records expenses
 - Rental asset information (cost, date placed in service, etc.)
- 1099-R (Pension/IRA/annuity income forms)
- 1099-SSA/ RRB-1099 (Social security/RRB forms)
- 1099-INT, 1099-OID, 1099-DIV (Interest/dividend income)
- 1099-B, 1099-S (income from sales of stock or other property)
 - Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)
- W-2G (Gambling winnings)
- Amount of any alimony received
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Other 1099
- Forms 1098 or other mortgage interest statements
- Forms 1098-T from educational institutions
 - Records of any scholarships/fellowships you received (if not on 1098T)
 - Receipts educational expenses (if not on 1098T)
- Form 1098-E (if you paid student loan interest)
- Form 5498 (IRA contributions) if applicable
- Receipts for classroom expenses (for educators in grades K-12)
- Form 5498-SA showing HSA contributions
- Record of moving expenses not reimbursed by employer
- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Real estate and personal property tax forms

- Invoice showing amount of vehicle sales tax paid
 - Invoice of cash amounts donated (includes houses of worship, schools and/or other charitable organizations)
 - Amounts of miles driven for charitable or medical purposes
 - Invoice of non-cash charitable donations
 - Receipts of paid healthcare insurance and doctors/ dentists/ hospitals bills
 - Expenses related to your investments
 - Receipt paid for preparation of last year's tax return
 - Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel, job hunting expenses and etc.)
 - Receipts for energy-saving home improvements
 - Amount of any alimony paid and ex-spouse's full name and social security number
- Please contact our Tax Professionals if you have any concerns or questions.
-

***Last Year Tax returns if applicable.**