

Get ready for tax season with this quick and easy checklist

TAX PREPARATION CHECKLIST

For All Filers

- Driver's License
- Social Security Numbers (yourself, spouse, & dependents)
- Bank Accounts and Routing numbers
- Date of Birth (yourself, spouse, & dependents)
- Loan Statements
- Copy of Last Year's Tax Return

Income

- W-2s
- 1099s for All Forms of Income

Business Owners

- Tax ID
- Insurance Premium & Expenses
- Business Income & Expenses
- List of Assets & Equipment
- Mileage Logs

Home & Rental Properties

- 1098s: Interest on Mortgage, Equity, or Student Loans
- Paid Real Estate Taxes
- Insurance Premiums
- Energy Efficient Upgrade Receipts
- Rental Income
- Mileage & Receipts for Rental Repairs & Upgrades

Deductions

- Medical/Dental Expenses
- Health Insurance Payments
- IRA and HSA Contributions
- Vehicle Purchase Sales Tax
- Childcare Expenses
- Moving Expenses
- Educational Expenses

Other Miscellaneous

- Estimated Tax Payments (self-employed)
- IRA/401K Total Contributions



UNIFY TAX SERVICES

TAX PREPARATION SERVICES

Please note, further information or documents may be requested as this is not an exclusive list.