

# TAX PREP checklist

## ALL TAXPAYERS

- ☐ SSN cards for anyone included on your tax return
- ☐ Birth Certificates for any dependents under 18 years of age
- ☐ Drivers Licenses for anyone over 18 years of age included on your tax return
- ☐ Medical insurance card and/or letter from doctor for any dependents under 18 years of age
- ☐ School letter and/or transcript for any dependents under 18 years of age
- ☐ Bank account & routing number
- ☐ Copy of last year's tax return
- ☐ Cost of last year's tax prep
- ☐ W-2 from all employers, W-2G from casino winnings
- ☐ K-1 forms from partnership or S-corporation profits/losses
- ☐ 1099 forms for all income/benefits

## HOMEOWNERS

- ☐ Mortgage interest statement (1098 Form)
- ☐ Mortgage insurance premiums
- ☐ Property taxes paid
- ☐ Closing documents if you bought/sold/refinanced during the year
- ☐ Energy efficient upgrade receipts/contracts

## RENTAL PROPERTY OWNERS

- ☐ Rental income
- ☐ Detailed list of expenses
- ☐ Mortgage interest
- ☐ Insurance premiums

- ☐ Real estate taxes paid
- ☐ Mileage for inspections & repairs

## BUSINESS OWNERS

- ☐ Employer Identification Number (EIN) verification letter
- ☐ Business income
- ☐ Detailed list of expenses
- ☐ List of capital assets & equipment
- ☐ Quarterly taxes paid
- ☐ Business use of home (if applicable)
- ☐ 12/31 bank balance
- ☐ Mileage log

## ADDITIONAL ITEMS

- ☐ Estimated tax payments
- ☐ Education expenses (Form 1098-T)
- ☐ Student loan interest statements (Form 1098-E)
- ☐ College savings contributions
- ☐ Retirement plan contributions (401K/IRA/SEP)
- ☐ HSA contributions/distributions
- ☐ Childcare expenses & provider information
- ☐ Moving expenses (if military)
- ☐ Medical/Dental/Vision Insurance premiums
- ☐ Medical /Dental/Vision out of pocket expenses
- ☐ Sales tax from vehicle purchases
- ☐ Vehicle registration taxes paid
- ☐ Charitable contribution receipts