

What To Bring For Your Tax Appointment



Getting organized to prepare for your tax appointment can save you a ton of time and is well worth the effort.

TAX PREPARATION CHECKLIST

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If it's just after tax season, this list will help you know what documents to keep an eye out for throughout the year and set aside. If your tax appointment is right around the corner, this list is a great resource to help you track down the right documents.

With all of the changes every year (and, of course, that's especially true THIS year), filing your taxes on your own is not for the faint of heart. That's even with nice-looking softwares on the market which purport to make it easy for you.

But that's what we're here for.

Below is a list of what you will need during the tax preparation process. Not all of them will apply to you — probably MOST will not. Nonetheless, it's a useful tax preparation checklist. Feel free to even print it out and keep a copy in your filing cabinet.

Before you get overwhelmed: yes, this is a long list — but it's the unfortunate reality of our tax code that it's not even comprehensive! But these items will cover 95% of our clients. Really, this is for ensuring that we're able to help you keep every dollar you can keep under our tax code.

Even if for some strange reason you won't be using our cost-effective services this year, feel free to use this list as a handy guide...

Tax Preparation Checklist

Personal Data

- Social Security Numbers & DOB (including spouse and children)
- Residential address(es) for this year
- Child care provider tax I.D. or SSN and address
- Dates of birth
- Type of dependent relationship (i.e. son, grandson, not related, etc.)
- Last year's or most recent federal and state tax returns (if not on file)

Employment & Income Data

- W-2 forms for this year
- Form 1099- G: Tax refunds and unemployment compensation
- Form 1099-NEC and/or 1099-MISC: Miscellaneous income including rent
- Form K-1: Partnership, trust, and S-Corporation income
- Form 1099-R: Pensions, annuities, retirement or profit-sharing plans, IRAs, etc.
- Form 1099-B: Brokerage Statements
- Form SSA-1099/1042S: Social Security benefit statement
- Form 3922: Transfer of Stock options exercised
- Alimony received (including payer's SSN) if divorce finalized prior to 1/1/2019
- Jury duty pay
- Form W-2G: Gambling and lottery winnings
- Prizes and awards
- Scholarships and fellowships
- Cryptocurrency sales (including coin-to-coin trades) - report of any cryptocurrency activities

Health Insurance Information

- All 1095-A Forms from marketplace providers (if you purchased insurance through a Marketplace)
- Records of credits and/or advance payments received from the Premium Tax Credit (if claiming)

Homeowner/Renter Data

- Residential address(es) for this year
- Form 1098: Mortgage interest
- Form 1099-S: Sale of your home or other real estate
- Second mortgage interest paid (if you don't rent that property or rent it only under specific conditions — check with us)
- Real estate taxes paid
- Rent paid during tax year
- Settlement statement for any real estate purchased or sold during the year
- Moving expenses (if active military and moving for new orders)
- Reimbursements for moving (counts as ordinary income)
- Personal property tax information

Financial Assets

- Form 1099-INT & 1099-OID: Interest income statements
- Form 1099-DIV: Dividend income statements
- Form 1099-B: Proceeds from broker transactions
- Form 1099-R: Retirement plan distribution
- Capital gains or losses

Financial Liabilities

- Auto loans and leases (account numbers and car value) if vehicle used for business
- Form 1098-E: Student loan interest paid
- Early withdrawal penalties on CDs and other fixed time deposits
- Government grants/loans - date(s), amount(s) received, current balance due, and any forgiveness received for the debt

Automobiles

- Personal property tax information
- Department of Motor Vehicles fees (only if including sales or property tax)
- Sales tax on purchase

Expenses

- Gifts to charity (receipts for any single donations of \$250 or more, and non-cash donations of \$500 or more)
- Unreimbursed expenses and mileage related to volunteer work
- Health insurance information (Form 1095-C for Employer-Provided Health Insurance Offer and Coverage)
- Education expenses (tuition and fees)
- Childcare expenses
- Job-hunting expenses
- Investment expenses
- Form 1099-SA: Medical Savings Accounts and Health Savings accounts
- Adoption expenses
- Alimony paid (including payee's SSN) if divorce finalized prior to 1/1/2019

Self-Employment Data

- Estimated tax vouchers for the current year
- Self-employment income
- Self-employment SEP plans, Simple IRA
- Self-employed health insurance (do not include COBRA)
- K-1s on all partnerships
- Receipts or documentation for business-related expenses
- Farm income and expenses
- Rent income and expenses

Deduction Documents

- Gifts to charity
- State and local income taxes
- Retirement plan contributions
- Medical expenses
- Casualty or theft losses
- Other miscellaneous deductions
- Educator expenses

Credits

- Energy improvements
- Form 1098-T: Education expenses (tuition and fees)
- Adoption expenses