

TAX PREP CHECK LIST

Personal Information

- SSN or Tax ID Number
- Spouses full name SSN or Tax ID
- Drivers License Information
- Direct Deposit Information

Dependent Information

- Full Name
- Birthdates and SSN
- Childcare records
- Form 8332 if non custodial

Employee Information

- Form W2

Self Employment Income

- 1099 MISC, 1099 NEC or K-1
- Income not reported on forms
- Itemized total of all Expenses
- Business use asset information for depreciation.
- Total SF of home and SF of home office space and all expenses for home (ie electric, gas, water, insurance, mortgage information
- Mileage driven for business and Mileage driven in total
- Cell phone bill

Rental Property Income

- Records of income and expenses
- Asset information for depreciation
- Cell Phone bill
- Mortgage information
- Utilities paid

Retirement/IRA Information

- SSA-1099 or RRB-1099
- Pension/Annuity Income 1099R
- IRA Contributions 5496

Savings and Investments

- Interest, Dividend Income (1099INT, 1099-OID, 1099DIV)
- Stocks 1099B or 1099S
- Crypto Loss Gain statements

Education

- Form 1098-T from school
- Itemized amounts for education expenses
- Student Loan interest paid 1098E
- 1099Q if paid by College Savings plan

Other Deductions

- HAS Contributions and Distributions 1099-SA
- Moving Expenses if Military
- 1098 Mortgage Interest Statement
- Cash donations and household goods/clothing donation amount
- Medical Expenses (Doctors Dentists Glasses Chiropractors etc.
- Investment Expenses
- Amount of Estimated Taxes Paid if any

Other Income

- Unemployment or State Refund 1099-G
- Gambling income W-2G and any expenses for the gambling winnings
- 1099-C Cancellation of Debt
- Long Term Care reimbursements 1099-LTC
- HAS Withdrawals 1099-SA
- Jury Duty
- Prizes and awards
- Other 1099 information