

Tax Preparation Checklist

Personal Information

- Social Security numbers (SSNs) or Taxpayer Identification Numbers (TINs) for yourself, your spouse, and any dependents
- A valid photo ID (e.g., driver's license, state ID)
- Bank account and routing numbers for direct deposit

Income Documents

- W-2 Forms: From all employers
- 1099 Forms: NEC, MISC, K, INT, DIV, B, G, R, S (for various types of income)
- Business Income and Expenses (if self-employed): Profit and loss statements, mileage records, business-related receipts
- Rental income and expenses (if applicable)
- Alimony received (if applicable)
- Other income (e.g., gambling winnings, jury duty pay, hobby income)

Deductions and Credits

- Mortgage interest statement (Form 1098)
- Property tax statements
- Childcare expenses (include provider's name, address, and tax ID)
- Education expenses (e.g., tuition receipts, Form 1098-T)
- Student loan interest (Form 1098-E)
- Medical and dental expenses
- Charitable donations (receipts or acknowledgment letters)

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- IRA contributions and HSA contributions
- Energy-efficient home improvements (receipts and certifications)
- Adoption expenses

Taxes Paid

- State and local income taxes paid
- Real estate taxes paid
- Personal property taxes (e.g., vehicle registration fees)
- Estimated tax payments made during the year

Health Insurance

- Form 1095-A (if you purchased insurance through the marketplace)
- Form 1095-B or 1095-C (if you had employer-provided insurance)

Other Financial Information

- Previous year's tax return (if available)
- Records of any tax payments made (federal or state)
- Information about stimulus payments (if applicable)
- Advance Child Tax Credit payments (Letter 6419)

For Business Owners or Self-Employed Individuals

- Profit and loss statements
- Business-related receipts

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- Mileage logs and vehicle expenses
- Office/home office expenses
- 1099 forms received for work completed
- Payroll documents (if you have employees)

Other Considerations

- Any correspondence from the IRS or state tax agencies
- Documentation for any unusual events, such as natural disasters, property sales, or settlements