TAX CHECKLIST

GENERAL

- [ ] Bank account & routing number for refunds/payments
- [ ] Bank statements
- [ ] Credit card statements
- [ ] Investment statements
- [ ] Social Security Numbers for you & family members
- [ ] Copies of last year's returns
- [ ]
- [ ]

INCOME

- [ ] W2 for employment income
- [ ] 1099 for misc income- employment, investments, winnings
- [ ] Sale of property
- [ ] Unemployment income
- [ ] Alimony received
- [ ]
- [ ]
- [ ]

ADJUSTMENTS/CREDITS

- [ ] 1098 for interest paid on loans
- [ ] Mortgage interest
- [ ] Student loan interest
- [ ] Tuition
- [ ] Job expenses
- [ ] Casualties/theft/losses
- [ ] Alimony paid
- [ ]

PAID TAXES

- [ ] Property taxes
- [ ] State taxes
- [ ] Local taxes
- [ ] Vehicle registrations/licenses
- [ ]
- [ ]
- [ ]
- [ ]

RETIREMENT

- [ ] IRA/401/retirement contributions
- [ ] Account information for retirement plans
- [ ] rental property information
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]

MEDICAL

- [ ] medical expenses
- [ ] dental expenses
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]

CHARITABLE

- [ ] donation records
- [ ] charitable gifts
- [ ] volunteer expenses
- [ ] tithes
- [ ]
- [ ]
- [ ]
- [ ]

MISC/EXTRAS

- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]