Tax Documentation Checklist

**General Taxable Income**  
\_\_\_ Alimony Received or Paid (prior to 12/31/2018)  
\_\_\_ Dividend Income Statements: Form 1099-DIV  
\_\_\_ Interest Income Statements: Form 1099-INT & 1099-OID  
\_\_\_ Miscellaneous Income: Form 1099-MISC or 1099-NEC  
\_\_\_ Sales of Real Estate: Form 1099-S  
\_\_\_ Sales of Stock, Land, etc.: Form 1099-B  
\_\_\_ State Tax Refunds: Form 1099-G  
\_\_\_ Unemployment Compensation Received 1099-G  
\_\_\_ W-2 Form(s) for Wages, Salaries, and Tips  
  
**Retirement Income**  
\_\_\_ Railroad Retirement & Social Security Income: Form SSA-1099  
\_\_\_ Retirement Income: Form 1099-R  
  
**Business Income**  
\_\_\_ Business Income and Expenses   
\_\_\_ Farm Income and Expenses  
\_\_\_ Form K-1 Income from Partnerships, Trusts, and S-Corporations  
\_\_\_ Rental Income and Expenses  
\_\_\_ Tax Deductible Miles Traveled for Business Purposes  
  
**Tax Credits Checklist**  
\_\_\_ Adoption Expense Information  
\_\_\_ Child Care Provider Address, I.D. Number and Amounts Paid  
\_\_\_ First Time Home Buyer Tax Credit  
\_\_\_ Foreign Taxes paid  
\_\_\_ Letter 6419, Advanced Child Tax Credit Payments Letter

\_\_\_ Notice 1444-C or Letter 6475, Economic Stimulus Payment Letter

**Expense and Tax Deduction Checklist**  
\_\_\_ Charitable Cash Contributions  
\_\_\_ Doctor and Dentist Payments  
\_\_\_ Fair Market Value of Non-cash Contributions to Charities  
\_\_\_ Home Mortgage Interest from Form 1098M  
\_\_\_ Home Second Mortgage Interest Paid  
\_\_\_ Hospital and Nurse Payments  
\_\_\_ Investment Expenses  
\_\_\_ IRA Contributions  
\_\_\_ Medical Expenses for the Family  
\_\_\_ Medical Insurance Paid  
\_\_\_ Miles Traveled for Volunteer Purposes  
\_\_\_ Miles Traveled for Medical Purposes  
\_\_\_ Personal Property Taxes Paid  
\_\_\_ Prescription Medicines and Drugs  
\_\_\_ Real Estate Taxes Paid  
\_\_\_ State Taxes Paid with Last Year's Return (if itemized)  
\_\_\_ Student Loan Interest Paid (Up to $2,500) 1098-E  
\_\_\_Unreimbursed Expenses Related to Volunteer Work  
  
**Tax Estimate Payments Checklist**  
\_\_\_ Estimated Tax Payments Made with ES Vouchers  
\_\_\_ Last Year's Tax Return Overpayment Applied to This Year  
\_\_\_ Off Highway Fuel Taxes Paid  
  
**General Information**  
\_\_\_ Bank Routing Transmit Number and Account Number (Direct Deposit) – With each return  
\_\_\_ Child Care Expenses for Each Dependent (Name, address, Social Security/EIN, Phone Number and amount paid to the Caretaker)  
\_\_\_ Copy of Last Year's Tax Return  
\_\_\_ Dependents' Names, Dates of Birth, and copy of Social Security Cards  
\_\_\_ Dependents' Post High School Educational Expenses (Accredited Institution, not K-12)  
\_\_\_ Educational Expenses for You, Your spouse and Dependents 1098-T  
\_\_\_ Prior Year Adjusted Gross Income (AGI) & Personal Identification  
\_\_\_ Social Security Cards for You, Your Spouse and Your Dependents