

MIGENTE

EDUCATIONAL SERVICES

TAX PREP CHECKLIST

BASICS FOR ALL FILERS

- social security numbers (yourself & dependents)
- copy of last year's tax return
- bank account / routing number
- loan statements

INCOME

- W-2s
- 1099s for all forms of income

HOME & RENTAL PROPERTIES

- 1098s; interest on mortgage, equity or student loans
- paid real estate taxes
- insurance premiums
- energy efficient upgrade receipts
- purchase/sale records (home, rental property, etc)
- rental income
- mileage (for rental related issues)
- receipts; for rental upgrades, repairs, upgrades, etc.

DONATIONS

- charitable contributions receipts
- volunteer expense deductions

BUSINESS OWNERS

- tax ID
- insurance premiums and/or expenses
- business income and expenses
- list of assets and equipment
- mileage logs

DEDUCTIONS

- medical / dental expenses
- health insurance payments
- IRA and HSA contributions
- vehicle purchase sales tax
- childcare expenses
- amount paid for last year's tax prep
- sales tax on newly purchased vehicles
- educational expenses

OTHER MISC.

- record of estimated tax payments
- IRA/401K total contributions

(866) 644-3683