

General Information

1. ___ Copy of Last Year's Tax Return
2. ___ Social Security Numbers for You and Your Spouse
3. ___ Educational Expenses for You and Your Spouse
4. ___ Dependents' Names, Years of Birth, and Social Security Numbers
5. ___ Dependents' Post High School Educational Expenses
6. ___ Child Care Expenses for Each Dependent
7. ___ Prior Year Adjusted Gross Income (AGI) - how to find last year's adjusted gross income (AGI)
8. ___ Routing Transmit Number (RTN) (For direct deposit/debit purposes)
9. ___ Bank Account Number (BAN) (For direct deposit/debit purposes)

Taxable Income Forms, Documents

10. ___ Most common Income, deduction forms
11. ___ W-2 Form(s) for Wages, Salaries, and Tips
12. ___ Interest Income Statements: Form 1099-INT & 1099-OID
13. ___ Dividend Income Statements: Form 1099-DIV
14. ___ Sales of Stock, Land, etc. for Capital Gains: Form 1099-B
15. ___ Sales of Real Estate: Form 1099-S
16. ___ State Tax Refunds: Form 1099-G
17. ___ Alimony received or paid
18. ___ Unemployment Compensation received: Form 1099-G
19. ___ Nonemployment Compensation: Form 1099-NEC
20. ___ Miscellaneous Income: Form 1099-MISC
21. ___ Retirement Income: Form 1099-R
22. ___ Social Security Income and Railroad Retirement Income: Form SSA-1099
23. ___ Business Income and Expenses
24. ___ Rental Income and Expenses
25. ___ Farm Income and Expenses
26. ___ Form K-1 Income from Partnerships, Trusts, and S-Corporations
27. ___ Tax Deductible Miles Traveled for Business Purposes

Tax Deductions, Expenses

28. ___ Medical Expenses for the Family
29. ___ Medical Insurance Paid
30. ___ Self-employed Business Expenses
31. ___ Prescription Medicines and Drugs
32. ___ Doctor and Dentist Payments
33. ___ Hospital and Nurse Payments
34. ___ Tax Deductible Miles Traveled for Medical Purposes
35. ___ Home Mortgage Interest from Form 1098
36. ___ Home Second Mortgage Interest Paid
37. ___ Real Estate Taxes Paid
38. ___ State Taxes Paid with Last Year's Return (if claiming itemized deductions)
39. ___ Personal Property Taxes Paid
40. ___ Charitable Cash Contributions
41. ___ Fair Market Value of Non-cash Contributions to Charities
42. ___ Unreimbursed Expenses Related to Volunteer Work
43. ___ Tax Deductible Mileage for Volunteer Purposes
44. ___ Casualty and Theft Losses
45. ___ Amount Paid to Professional Preparer Last Year
46. ___ Unreimbursed Expenses Related to Your Job
47. ___ Miles Traveled Related to Your Job
48. ___ Union and Professional Dues
49. ___ Investment Expenses
50. ___ Job-hunting Expenses
51. ___ IRA Contributions
52. ___ HSA, FSA Contributions
53. ___ Student Loan Interest Paid from Form 1098
54. ___ Moving Expenses
55. ___ Last Year's Tax Return Preparation Fee

Tax Credits

- 56. ___ Child Tax Credit
- 57. ___ Child Care Provider Address, I.D. Number and Amounts Paid for the Child and Dependent Care Credit
- 58. ___ Earned Income Tax Credit (EITC)
- 59. ___ Adoption Expense Information for the Adoption Tax Credit
- 60. ___ Foreign Taxes paid
- 61. ___ First Time Home Buyer Tax Credit

Tax Estimate Payments

- 62. ___ Estimated Tax Payments Made with ES Vouchers or Online
- 63. ___ Last Year's Tax Return Over-Payment Applied to This Year
- 64. ___ Off Highway Fuel Taxes Paid