

# Tax Season Checklist



Gathering tax documents can be a daunting task, so get started early and keep the items below in mind as tax season approaches. Remember, we're here if you have questions.

- Basic Personal and Family Information**  
Social security or tax ID numbers and dates of birth for all family members and any applicable childcare provider information
- Income Documentation**  
W-2 and Unemployment documentation. If self employed, expense records, income records of estimated tax payments and withholding
- Other Income and Losses**  
Records of rental income, retirement income, investments and interest, gambling winnings, and any other 1099s
- Deductions**  
Records of qualifying deductions
  - Home Ownership**  
Mortgage and Property Tax
  - Charitable Donations**  
Cash amounts or records on non-cash donations
  - Medical Expenses and Health Insurance**  
Proof of health insurance
  - Childcare an Educational Expenses**  
Daycare or nanny payment receipts, educational expenses or student loan interest paid
  - Retirement Contributions**  
HSA and IRA contributions/distributions
  - State and Local Taxes**