THE TAX EMPIRE

TAX PREPARATION CHECKLIST

ALL TAX FILERS

- [ ] SSN & DOB (yourself and dependents)
- [ ] Bank account & routing number
- [ ] Copy of last year's tax return
- [ ] W2's from all employers
- [ ] 1099 forms from other income/benefits
- [ ] Charitable contributions
- [ ] Medical/Dental expenses
- [ ] Health insurance premiums
- [ ] _____

BUSINESS OWNERS

- [ ] Tax ID
- [ ] Business income & expenses
- [ ] List of capital assets & equipment
- [ ] Quarterly taxes paid
- [ ] Business use of home (if applicable)
- [ ] 12/31 bank balance
- [ ] Mileage log
- [ ] _____
- [ ] _____

RENTAL PROPERTY OWNERS

- [ ] Rental income
- [ ] Receipt for all expenses
- [ ] Insurance premiums
- [ ] Real estate taxes paid
- [ ] Mileage for inspection & repairs
- [ ] Mortgage interest

RESIDENTIAL PROPERTY OWNERS

- [ ] 1098 form (mortgage interest)
- [ ] Receipt from energy efficient upgrades
- [ ] Insurance premiums
- [ ] Real estate taxes paid
- [ ] 1099 forms from other income/benefits
- [ ] Closing document if you bought/sold during the year

OTHER

- [ ] Retirement plan contributions
- [ ] Childcare expenses
- [ ] Sales tax from vehicle purchase
- [ ] Job search & moving expenses
- [ ] Educational expenses
- [ ] FEMA assistance
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____