

SEWELLS AFFORDABLE TAX SERVICE

208 Shaver Drive, Talbott TN 37877

(423) 581-4388 - (423) 231-7542

TAX PREP CHECKLIST

WHAT YOU NEED TO BRING TO FILE YOUR TAXES

PERSONAL INFORMATION:

- SSN'S or ITIN'S, full names, and birth dates for everyone included on the return
- Childcare records (including the provider's ID number) if applicable
- Proof of child's residency (School records, medical records, 1095-A, B, or C)

INCOME/INVESTMENT/RETIREMENT:

- All forms that say W-2, 1098, 1099, or Schedule K-1
- Purchase date and total investment in any stocks or property you sold
- Expenses related to your investments
- Records of any contributions you made to IRA's, other retirement plans, and 529 plans or education saving account
- Records of business income and expenses if you're an independent contractor, are self-employed, or own rental real estate.

EDUCATION:

- Education scholarships and fellowships
- Records of tuition and higher education expenses, and Form 1098-T

ITEMIZED DEDUCTIONS:

- Form 1098
- Mortgage interest, real estate, and personal property tax records
- Prior year's amount of state/local income tax paid
- Records of cash amounts donated to houses of worship, schools, and other charitable organizations
- Records of non-cash charitable donations

HEALTHCARE:

- Form 1095-A if you are enrolled in an insurance plan through the Marketplace (Exchange)
- Marketplace exemption certificate if you applied for and received an exemption from the Marketplace (Exchange)
- Form 1095-B or Form 1095-C if you have insurance through a private plan or employer plan
- HSA information (Forms 5498, 1099-SA) and receipts for medical expenses