



# Tax Tips By Tiff

## Tax preparation documentation checklist

Below is a list of documents needed to prepare your tax returns. Please keep in mind not all documents will pertain to all people. Feel free to reach out to me if you have any questions or concerns or are unable to obtain your documents as they can be requested directly from the IRS.

### Personal Information

Your full legal name

Your social security Number

Date of Birth

Spouse full legal name

Spouse Social Security Number

Spouse Date of Birth

### Dependent Information

Full legal name

Social Security Number

Date of Birth

Full legal name

Social Security Number

Date of Birth

Full legal name

Social Security Number

Date of Birth

Full legal name

Social Security Number

Date of Birth

Full legal name

Social Security Number

Date of Birth

## **Dependent Documentation**

Childcare records (including the provider's tax ID number) if applicable

Income of other adults in your home

Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent

## **Income Sources**

### **Employed**

W-2

### **Unemployed**

Unemployment, state tax refund (1099-G)

### **Self-Employed**

1099

K-1

Records verifying amounts that were not reported on 1099s

Records of all expenses (utilities, advertising, supplies, etc.)

Business-use asset information (cost, date placed in service, etc.) for depreciation

Vehicle for business:

Vehicle for personal and business use:

Year, make & model:

Miles for the year:

Miles used strictly for business:

Home office:

Home's total SQ FT:

Office area's SQ FT:

Record of estimated tax payments made (Form 1040-ES)

## **Rental Income**

Records of income and expenses

Rental asset information (cost, date placed in service, etc.) for depreciation

Record of estimated tax payments made (Form 1040-ES)

## **Retirement Income**

Pension/IRA/annuity income (1099-R)

Traditional IRA basis (i.e., amounts you contributed to the IRA that were already taxed)

Social security/RRB income (1099-SSA, RRB-1099)

## **Savings & Investments or Dividends**

Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)

Income from sales of stock or other property (1099-B, 1099-S)

Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)

1099-SA & 5498-SA Health Savings Account

1099-LTC Long-term care reimbursements

Expenses related to your investments

Record of estimated tax payments made (Form 1040-ES)

Transactions involving cryptocurrency (Virtual currency)

## **Other Income & Losses**

Gambling income (W-2G or records showing income, as well as expense records)

Jury duty records

Hobby income and expenses

Prizes and awards

Trusts

Royalty Income 1099–Misc.  
Any other 1099s received not related to a business

Record of alimony paid/received with ex-spouse's name and SSN

### **Home Ownership**

1098 or other mortgage interest statements

Real estate and personal property tax records

Receipts for energy-saving home improvements (e.g., solar panels, solar water heater)

### **Charitable Donations**

Cash amounts donated to houses of worship, schools, other charitable organizations

Records of non-cash charitable donations

Amounts of miles driven for charitable purposes:

### **Medical Expenses**

Amounts paid for healthcare insurance and to doctors, dentists, hospitals

Amounts of miles driven for medical purposes:

### **Health Insurance**

Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)

### **Childcare Expenses**

Fees paid to a licensed day care center or family day care for care of an infant or preschooler

Wages paid to a baby-sitter

Don't include expenses paid through a flexible spending account at work

### **Educational Expenses**

Forms 1098-T from educational institutions

Receipts that itemize qualified educational expenses

Records of any scholarships or fellowships you received

Form 1098-E if you paid student loan interest

### **K-12 Educator Expenses**

Receipts for classroom expenses (for educators in grades K-12)

### **State & Local Taxes**

Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid

Invoice showing amount of vehicle sales tax paid

### **Retirement & Other Savings**

Form 5498-SA showing HSA contributions

Form 5498 showing IRA contributions

All other 5498 series forms (5498-QA, 5498-ESA)

### **Federally Declared Disaster**

City/county you lived/worked/had property in:

Records to support property losses (appraisal, clean-up costs, etc.)

Records of rebuilding/repair costs

Insurance reimbursements/claims to be paid

FEMA assistance information

Check FEMA site to see if my county has been declared a federal disaster area