





Tax Preparation Checklist to File Your Taxes

Reminder: 2023 taxes are due April 15, 2024 for calendar year filers

You	Spouse	Dependents	 Basic Info
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Name, SSN or ITIN, and Date of Birth
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Last Year's Return - hard copy or PDF file (TaxAct can import basic info from PDF's of returns prepared by select software solutions)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Estimated Taxes Paid

You	Spouse	Dependents	 Documents Received
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form W-2s - wage and tax statements
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1095s - includes health insurance marketplace statement (1095-A), health coverage (1095-B) and employer-provided health insurance offer and coverage (1095-C)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1098s - includes mortgage interest (1098) and student loan interest (1098-E)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1099s - includes dividend income (1099-DIV), interest income (1099-INT & 1099-OID), merchant card and third party network payments (1099-K), miscellaneous income (1099-MISC), retirement plan distribution (1099-R), sale of home or real estate (1099-S), capital gain transactions (1099-B), distributions from an HSA, Archer MSA, or Medicare Advantage MSA (1099-SA) and unemployment compensation (1099-G)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 2439s - notice to shareholder of undistributed long-term capital gains
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Schedule K-1s - partnership, S Corporation and estate or trust income

You	Spouse	Dependents	 Personal Records
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Child and Dependent Care Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Education Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Medical Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Vehicle (Personal Property) Taxes Paid

You	Spouse	Dependents	 Personal Records
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Real Estate Taxes
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mortgage Interest Paid
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Charitable Contributions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Business or Employee Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Gambling Expenses

You **Spouse** **Dependents**  **Personal Records**

- | | | | |
|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Investment Transactions |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Retirement Contributions |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Foreign Earned Income and Foreign Taxes Paid |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Moving Expenses |

You **Spouse** **Dependents**  **E-File/Print**

- | | | | |
|--------------------------|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Bank Information (Account and Routing Number for Direct Deposit/Withdrawal) |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Prior year's Self-Select PIN or Prior year's AGI (Adjusted Gross Income) |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Driver's license |

Notes