

Tax Preparation Checklist

Personal Information:

Your social security card or tax ID and state issued driver's license or ID card
Your spouse's social security card or tax ID and state issued driver's license or ID card
Amount of any alimony paid and ex-spouse's full name and social security number

Information About Other People Who May Belong on Your Return:

Dates of birth and social security cards or tax ID numbers for all dependents
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 (if applicable)

Education Payments:

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

Employee Information:

Forms W-2

Self-Employment Information:

Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s
Records of all expenses — check registers or credit card statements, and receipts
Business-use asset information (cost, date placed in service, etc.) for depreciation
Office in home information, if applicable

Business Use of Vehicle Information:

Log showing total miles driven for the year (or beginning/ending odometer readings), total business miles driven for the year (other than commuting), and the business purpose of the mileage
Amount of parking and tolls paid
If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

Rental Property Income:

Records of income and expenses
Rental asset information (cost, date placed in service, etc.) for depreciation

Retirement Income:

Pension/IRA/annuity income (1099-R)
Social security/RRB income (1099-SSA, RRB-1099)

Savings and Investments:

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

Other Income:

- Unemployment, state tax refund (1099-G)
- Gambling income (W-2G or records showing income, as well as expense records)
- Amount of any alimony received
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Other 1099

Affordable Care Act:

- Form 1095-A if you enrolled in an insured plan through the Marketplace (Exchange)
- Marketplace exemption certificate if you applied for and received an exemption from the Marketplace (Exchange)

Other Deductions and Credits:

- Receipts for classroom expenses (for educators in grades K-12)
- Form 5498-SA showing HSA contributions
- Record of moving expenses not reimbursed by employer
- Forms 1098 or other mortgage interest statements
- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Real estate and personal property tax records
- Invoice showing amount of vehicle sales tax paid
- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- Amounts of miles driven for charitable or medical purposes
- Expenses related to your investments
- Amount paid for preparation of last year's tax return
- Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
- Job-hunting expenses
- Receipts for energy-saving home improvements
- Record of estimated tax payments made

IRA Information:

- Form 5498 showing IRA contributions
- Traditional IRA basis

If you were affected by a 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