



Personal Income Tax Checklist

Personal Information

- Last year's tax return
- Spouse & dependents names
- Email Address
- Current address & phone number
- SSN and date of birth for self and dependents
- Amount paid last year for tax preparation

Income Information

- W-2s
- 1099-R – Retirement Income
- 1099-Div – Dividends
- 1099-G State Refund
- 1099-G Unemployment Income
- 1099-Misc – Miscellaneous Income
- 1099-INT – Interest Income
- SSA 1099 – Social Security Income
- W-2G – Gambling Winnings
- 1099C – Cancellation of Debt
- Alimony Received

Deductions/Credits

- 1098-E Student Loan Interest Paid
- IRA Contributions
- 1098 T – Tuition Statement
- Documentation for moving Expenses
- Teachers- Teaching Expenses
- Alimony Paid & Ex spouse SSN
- Self Employed Health Insurance

Itemized Deductions

- 1098 Mortgage Statement
- Health Insurance and Medical Expenses
- Monetary Charitable Donations
- Medical Mileage
- Child Care Expenses & Provider Information
- Sale or Purchase of House
- Estimated Tax Payments
- Real Estate Taxes Paid
- Dental Expenses
- Non-Monetary Donations
- Balance for Prior year state/local tax balance
- Unreimbursed Job Expenses ie. : union dues; (uniforms, supplies, seminars, continuing education, publications, travel, etc.).
- Gambling Losses