THERESA D. PROPS, CPA

2018 PERSONAL TAX PREPARATION CHECKLIST

PERSONAL INFORMATION

- [ ] **Legal Information**
  You'll need the full legal names, dates of birth and Social Security numbers or tax ID numbers for yourself, your spouse and your dependents.
- [ ] **Last Year's Tax Return**

INCOME

- [ ] **Personal Income Statements**
  You'll need a W-2 for each job held during the tax year by you, your spouse and any dependents. If you are self-employed, you will need all your financial records as well as all Forms 1099-MISC you might have received during the year.
- [ ] **Investment or Interest Income Statements**
  These include Forms 1099-INT, 1099-DIV, 1099-OID and 1099-B as well as the Schedule K-1.
- [ ] **Pension/IRA/Annuity Income**
  Form 1099-R
- [ ] **Social Security/RRB Income**
  Forms SSA-1099 and RRB-1099

Income From the Sale of a Home or Property
Form 1099-S

Unemployment Compensation and State Tax Refunds
Form 1099-G

HSA and Long-Term Care Reimbursements
Forms 1099-SA and 1099-LTC

Trust and Estate Beneficiary Earnings
Form 1041

Other Income
This includes but is not limited to alimony received, jury duty pay, gambling and lottery winnings, rental property income, and scholarships and fellowships.

DEDUCTIONS

Homeowner Expenses
These include but are not limited to mortgage interest statements (Form 1098), property tax payment receipts, energy efficient upgrade receipts (Form 5695), and qualified moving expense receipts. (Moves must be work-related and more than 50 miles.)

Education Expenses
These include but are not limited to tuition statements and itemized receipts of qualified educational expenses (Form 1098-T) and student loan interest statements (Form 1098-E).

Charitable Contributions
You will need a detailed list of donations, and you must have receipts for contributions over $250 and a Form 1023 for vehicle donations.

Self-Employment Expenses

Gather records of business/home-office expenses, assets, pension plan contributions, health insurance payments and estimated tax payment receipts (state and federal) made this year.

Child and Dependent Care Expenses

You will need the name, address and tax ID or Social Security number of the provider.

Health Care Expenses

Gather together all records of medical and dental costs.

Alimony Expenses

You will need to provide your ex-spouse's full name and Social Security number.

Job-Related Educational Expenses

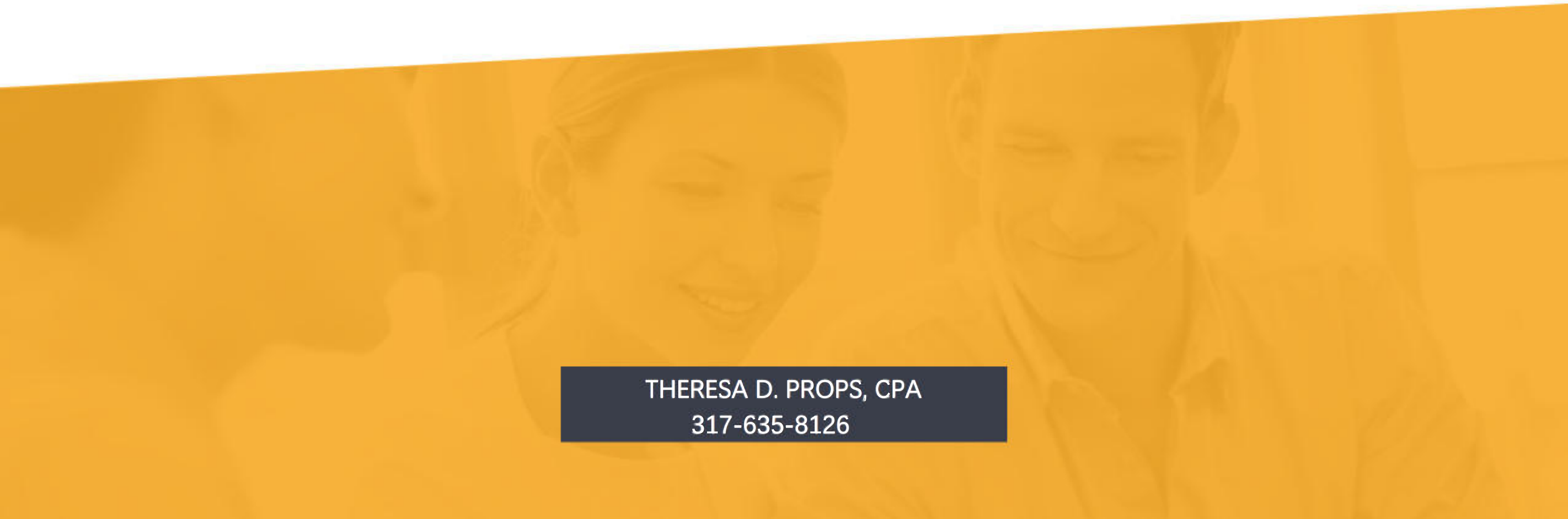
IRA Contributions

Form 5498

Health Savings Account Contributions

Form 5498-SA

NOTES



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