



TAX PREP CHECKLIST

BASICS

- Photo ID
- Social Security cards for yourself and all dependents
- Copy of last year's return
- Bank account and routing number (for refunds/payments)
- A check or debit/credit card to cover your tax prep fees

INCOME

- W-2s
- 1099s (from self-employment, interest earnings, investments, winnings, Social Security benefits, etc.)
- Record of additional income not reported on a W-2 or 1099 (rental income, alimony, hobby income, unemployment compensation, etc.)
- Purchase and sales records for any sold assets (home, rental property, stocks, etc.)

HOME

- Closing documents (if you just bought your home)
- Receipts for any home improvements that qualify for the Energy Tax Credit
- Insurance premiums
- Property tax payments

RETIREMENT

- Year-end account statement
- Yearly IRA/401-K contributions total

EXPENSES

- 1098s (for interest paid on mortgage, equity loan or student loans)
- Child care expenses (and child care provider's tax ID)
- Adoption expenses
- Job search expenses
- Moving expenses
- Health insurance premiums
- Medical and dental expenses (and record of any contributions to a Health Savings Account or Medical Savings account)
- Tuition
- Theft and casualty losses
- Alimony/child support paid (and ex's or child's SSN)
- State and local taxes paid (income and sales tax)
- Sales tax paid on newly purchased vehicles
- Amount paid for last year's tax prep
- Work related expenses (not covered by your employer) – dues, subscriptions, equipment, etc.

PAYMENTS

- Record of estimated tax payments made (if applicable)

CHARITY

- Receipts for any donations
- Volunteer expense deductions

Notes
