

Your Tax Prep Checklist

Personal Info

- ☐ Your (and your spouse) Social Security Card and Driver's License
- ☐ Dependent(s) dates of birth and social security card(s)
- ☐ Copy of last filed tax return

Sources of Income

- ☐ W-2 forms for employment
- ☐ 1099-MISC forms for any independent contractor work.
- ☐ 1099-G forms for unemployment income, or state/local tax refunds
- ☐ 1099-R forms for retirement income
- ☐ 1099-C forms for cancellation of debt
- ☐ 1099-S forms for sale of property income- and any adjustments
- ☐ 1099-INT, -DIV, -B, or K-1's forms for investment or interest income
- ☐ SSA-1099 for Social Security benefits
- ☐ Alimony received (with ex-spouses name and SSN)
- ☐ Business or farming income and expenses
- ☐ Rental Property income and expenses
- ☐ Misc income- jury duty, gambling, prizes, etc...

Adjustments to Income

- ☐ 1098-E for Student Loan Interest Paid
- ☐ 1098-T for Student Tuition Paid
- ☐ 1099 adjustments to income
- ☐ For Teachers: Receipts for expenses paid for classroom supplies
- ☐ Records of IRA contributions made during the year
- ☐ Receipts for qualifying energy-efficient home improvements (solar, windows, etc...)
- ☐ Alimony paid (with ex-spouses name and SSN)
- ☐ Keogh, SEP, SIMPLE, and other self-employed pension plans
- ☐ Childcare expenses- including the provider's tax ID number

Health Insurance

- ☐ Form 1095-A if you enrolled in an insurance plan through the marketplace
- ☐ Form 1095-B and/or 1095-C if you had insurance coverage through any other source

Deductions and Credits

If your expenses combined aren't higher than the standard deduction rate you qualify for, don't worry about collecting any documentation.

Standard deduction rates are- Single & Married filing Separately \$14,600, Head of Household \$21,900, Married Joint \$29,200.

- ☐ Medical and Dental expense records- incl. mileage to and from appointments
- ☐ Sales Tax on big ticket items- car, boat, RV, etc...
- ☐ Real Estate Tax
- ☐ Personal Property Tax
- ☐ Forms 1098 for Mortgage interest, private mortgage insurance (PMI), and points you paid
- ☐ Charitable Contributions (over \$500 REQUIRE a receipt)- Receipts, value of donated property, miles driven, and out-of-pocket expenses
- ☐ Mileage to and from volunteer events
- ☐ Casualties and Theft losses- amount of damage and insurance reimbursements