



TAX PREPARATION CHECKLIST

TO START

- Driver's License
- Social Security Cards for Every Dependent
- Birth Date for Each Person
- Physical Address (No PO Box)
- Phone Number
- Email Address
- Copy of Last Two Years Federal and State Tax Returns
- Direct Deposit Information (Bank Routing Number and Bank Account Number)
- Estimated Federal Tax Payments

INCOME

- W2's
- Self Employed/1099's
- Rental/Investment/Interest Income/1099-S
- Prizes/Gambling Income
- Retirement/1099-R
- Social Security Income/SSA-1099
- Alimony Received
- Unemployment Income/1099-G

OUT OF POCKET MEDICAL EXPENSE

- Insurance Premiums
- Prescriptions
- Dentist/Doctors
- Eyeglasses/Contacts
- Nursing Home/Rehab

DEDUCTIONS & ADJUSTMENTS

- Mortgage Interest Paid/1098
- Property Taxes
- Student Loan Interest Paid/1098-E
- Education Expense/Tuition Paid/1098-T
- Charitable Donations
- Childcare Paid (Institution's Tax ID, Name of Facility, and Amount Paid)
- Health Saving Account Contribution
- IRA Contribution
- Energy-Efficient Home Improvements
- Alimony Paid

MISCELLANEOUS

- Transactions Related to Crypto Currency
- Economy Stimulus Payment (Recovery Rebate Credit)
- Healthcare Forms/1095-A