



# Tax Prep Checklist



## Personal Information

- Your social security number or tax ID number
- Your spouse's full name and social security number or tax ID number
- Amount of any alimony paid and ex-spouse's full name and social security number
- Your tax returns for the previous three years. Your Tax Professional can check them for accuracy

## Information for others on your return

- Dates of birth and social security numbers or tax ID numbers
- Childcare records (including the provider's tax ID number) if applicable
- Income of other adults in your home
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)



## Employee Information Rental Property Income

- Forms W-2
- Records of income and expenses
- Rental asset information (cost, date placed in service, etc.) for depreciation



## Self-Employment Information

- Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s
- Summary of all expenses
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Office in home information, if applicable

## Retirement Income IRA Information

- Pension/IRA/annuity income (1099-R)
- Form 5498 showing IRA contributions
- Social security/RRB income (1099-SSA, RRB-1099)
- Traditional IRA basis



## Savings & Investments Education Payments

- Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Forms 1098-T from educational institutions
- Income from sales of stock or other property (1099-B, 1099-S)
- Summary of Out-of-Pocket Books and Supplies expenses
- Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)
- Records of any scholarships or fellowships you received Form 1098-E if you paid student loan interest

## If you were affected by a President-declared disaster

- City/county you lived/worked/had property in
- Records to support property losses (appraisal, clean up costs, etc.)
- Records of rebuilding/repair costs
- Insurance reimbursements/claims to be paid
- FEMA assistance information
- Check FEMA site to see if my county has been declared a federal disaster area



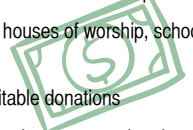
## Corporation

- Log showing total miles driven for the year (or beginning/ending odometer readings), total business miles driven for the year (other than commuting), and the business purpose of the mileage
- Income and Expense Statement/Profit or loss
- SOS Registration, EIN, Business Information Records



## Other Deductions and Credits

- Form 5498-SA showing HSA contributions
- Record of moving expenses (for military only)
- Forms 1098 or other mortgage interest statements
- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Real estate and personal property tax records
- Invoice showing amount of vehicle sales tax paid
- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- Amounts of miles driven for charitable or medical purposes
- Receipts for energy-saving home improvements
- Record of estimated tax payments made
- Escrow Statement if you sold/buy property
- Records of repairs and improvements made, if you sold a property



## Other Income

- Unemployment, state tax refund (1099-G)
- Gambling income (W-2G or records showing income, as well as expense records)
- Amount of any alimony received
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Other 1099

