

TAX PREP CHECKLIST

PERSONAL INFORMATION

Name, Address, & Social Security Number (SS#)
Your Spouse's Full Name & SS#
Alimony Paid: Full Name & SS# of Ex-Spouse
(Date of Divorce)

INFORMATION FOR OTHERS ON RETURN

Dates of Birth(s) and SS#s
Childcare Records Including Tax ID of Childcare
Provider
Income of Other Adults in Your Home
Form 8332 Showing Custodial Parent is
Releasing Their Right to Claim a Child to You (if
applicable)

EMPLOYEE INFORMATION

- Form W-2

RETIREMENT INCOME / IRA INFORMATION

- Pension/IRA Annuity Income (Form 1099-R)
Social Security Information (Form 1099 SSA)

SAVINGS & INVESTMENTS

- Investment & Dividend Income
(1099-Int, 1099-Div, 1099-OID)
Income From Sales of Stock or Other Property
(1099-B, 1099-S)
Dates of Acquisition & Records Showing Cost
Basis of Property Sold if not Reported on 1099-B

RENTAL PROPERTY INCOME

Records of Income & Expenses
Rental Asset Information (cost, date placed in
service, etc)

SELF-EMPLOYMENT INFORMATION

Forms 1099-Misc & Schedules K-1
Records of All Expenses
Business Use of Vehicle: Log of Miles & Business
Purpose

OTHER DEDUCTIONS AND CREDITS

Mortgage Interest Statement (Form 1098)
Real Estate Tax Records
Invoice Showing Vehicle Sales Tax paid
Records of Charitable Contributions (church,
201C-3, etc)
Records of Non-Cash Donations (Am-Vets, Good
Will, St Vincent, Easter Seals, etc)
Amounts Paid for Healthcare, Insurance,
Doctors, etc
Obamacare Form 1095A
Miles Driven for Charitable or Medical Purposes
Records of Energy-Saving Home Improvements
Record of Moving Expenses not Reimbursed by
Employer
Records of Estimated Tax Payments Made

EDUCATION PAYMENTS

- Forms 1098-T from Educations Institutions
Summary of all Itemized Education Expenses
Records of any Scholarships Received
Forms 1098-E: Interest Paid on Student Loans

OTHER INCOME

- Unemployment Income
State Tax Refund (Form 1099-G)
Alimony: Amount Received
Long-Term Care Reimbursement (1099-LTC)
Jury Duty Records
Hobby Income and Expenses
Prizes and Awards
Forms 1099-C: Cancellation of Debt
Forms 1099-A: Abandonment of Secured
Property
Repayments
Crypto Currency (Bitcoin)