

Tax Checklist

Personal Info

- Birthdates for both you and your spouse
- Current address
- Identity Protection PIN (IP PIN), if applicable
- ID
- Social security number tax numbers

Dependents' Info

- Dependents' names, birth dates, and social security numbers.
- Form 8832 confirming that there has been a release of the right to claim dependents (non-custodial parents)
- Income documents for dependents are necessary if their taxes are being filed by our office.

Income

Employment Income

- W-2 form(s)

Business Income and Other Records

- Business income generated by a sole proprietorship (1099-NEC)
- Farm Income
- Fishing Income
- Income generated by partnerships and S-Corporations (Form K-1)
- Records of income reported on other 1099 forms: 1099-K
- Records of income that are not reported on 1099 forms: cash and other income
- Estimated taxes record
- [Record of expenses](#) (Click the link for more info.)
- Record of [home office expenses](#)

Retirement or Disability Benefits

- Railroad retirement & social security income: form SSA-1099, form RRB-1099
- Retirement income: form 1099-R

Unemployment Income

- Unemployment compensation received: 1099-G

Investment and Asset Holders

- Cryptocurrency
- Dividend income statements: form 1099-DIV
- Interest income statements: form 1099-INT & 1099-OID
- [Rental income, expenses, and tax payments](#)
- Sales of real estate: form 1099-S
- Sales of stock, land, etc.: form 1099-B
- Expenses for investments

Other Sources of Income

- Alimony (see the link for exceptions)
- Hobby income
- Income from trusts
- Jury duty
- Miscellaneous income: form 1099-MISC
- Reports of prizes or lottery/gambling winnings
- Royalties
- Scholarships/fellowships are utilized for personal reasons.
- State tax refund(s): form 1099-G
- Records of any other income

Deductions

Deductions for Parents and Caretakers

- Adoption expense information
- College expenses for dependents
- Dependent care expenses: child care provider address, I.D. number, and amounts paid

- Contributions to college savings plan

Car Owner Deductions

- [Electric vehicle purchase info](#) (Click the link for more info.)

- Personal property taxes paid*

Homeowner Deductions

- Home mortgage interest from form 1098*
- Home second mortgage interest paid*
- Real estate taxes*
- First time home buyer info (2008 repayment)

- Energy credits for [energy-saving home improvements](#)

Charitable Donations

- Charitable cash donations*

- Non-cash donations*

Savings Deductions

- Health savings account deduction: 1099-SA & 5498-SA

- IRA contributions
- Retirement savings contribution

Medical/Health Deductions

- Form 1095-A is required if you signed up for an insurance plan through the Marketplace (Health Insurance Exchange)
- Insurance premiums not covered by the Marketplace or an employer-provided plan

- Payments made for healthcare, insurance (except for employer-provided plan premiums), and to doctors, dentists, and hospitals.*

Deductions of Education Expenses

- Education expenses (Keep receipts for your records).
- K-12 educators' expenses

- Scholarships
- Student loan interest paid
- Tuition expenses: 1098 T

Deductions for Federal Disaster Areas

- Details about insurance reimbursements and claims for FEMA assistance
- Documentation of the expenses involved in rebuilding/repair
- Records to support property losses (appraisal, cleaning costs, etc.)

Ensure that your county has been declared a federal disaster area by checking the [FEMA](#) website.

Other Tax Deduction Checklist

- Casualty and theft losses*
- Gambling losses*
- Miles traveled for volunteer purposes*
- Unreimbursed expenses related to volunteer work*

- Personal property taxes paid for boats and other property not previously listed*

Bank and Prior Tax Return Info

- Bank account and routing number or a voided check for direct deposit of your refund/ tax payment
- Bank name and account type (savings or checking)
- Copy of the tax return filed last year
- The tax preparation fee for last year

*Commonly a deduction for those who itemize on their tax return. For a clarification on what it means to take an itemized deduction, refer to the FAQ.