

TAX PREP CHECKLIST

BASICS FOR ALL FILERS

- Social security numbers(yourself & dependents)
- Copy of last year's tax return
- Bank account/routing number
- Valid Government issued ID

INCOME

- W-2s
- 1099s for all forms of income

HOME & RENTAL PROPERTIES

- 1098s(interest on mortgage, equity or student loans)
- paid real estate taxes
- insurance premiums
- energy efficient upgrade receipts
- purchase/sale records(home, rental property, etc.)
- rental income
- mileage (for rental related issues)
- receipts:for rental upgrades, repairs, upgrades, etc.

DONATIONS

- charitable contribution receipts
- volunteer expense deductions

BUSINESS OWNERS

- Tax ID
- Insurance premiums
- Business income and expenses
- List of assets and equipment
- Mileage logs

DEDUCTIONS

- medical/dental expenses
- health insurance payments
- IRA and HSA contributions
- vehicle purchase
- sales tax
- childcare expenses
- amount paid for last year's tax prep
- sales tax on newly purchased vehicles
- educational expenses
(loan interest/supplies/tuition)

OTHER MISC.

- record of estimated tax payments
- IRA/401K total contributions

