

# TAX PREPARATION CHECKLIST

**YOUR TAX RETURN CAN BE DONE MORE ACCURATELY AND IN A SHORTER PERIOD OF TIME BY PROVIDING ALL OF THE APPLICABLE INFORMATION.**

## PERSONAL INFORMATION

- Social Security Card(s)
- Driver's License(s)
- Dependents' Social Security Numbers and Dates of Birth
- Copy of Last Year's Federal & State Returns (New Clients Only)

## INCOME FORMS

- W-2 Wages
- 1099-R Pension or Retirement
- 1099-INT or Form 1099-DIV Interest & Dividends
- 1099-G State Income Tax Refund or Unemployment
- SSA-1099 Social Security Income
- 1099-B Sale of Stock or Bonds
- W-2G Gambling/Lottery Winnings
- 1099-C Cancellation of Debt
- Alimony Paid/Received
- 1099-MISC Self-Employment Income from Business or Farms and Expenses
- 1099-SA Distributions from HSA
- Commissions Received
- Rental Income & Expenses

- Schedule K-1 Partnership/S Corporation/Trust/Estates
- Other Income

## PERSONAL EXPENSES/DEDUCTIONS

- 1095-A, B or C Healthcare Information
- Childcare Expenses/Provider Address & ID #
- Medical/Eye/Dental Expenses
- Charitable Contributions Cash & Non-Cash
- Information regarding Sale/Purchase of Home
- 1098 Mortgage Interest Statement
- Real Estate/Personal Property Taxes Paid
- State & Local Sales Tax Paid
- Unreimbursed Employee Expenses
- Education Expenses (Work Related or 1098-T)
- 1098-E Student Loan Interest
- IRA/HSA Contributions
- Gambling Losses to the Extent of Winnings
- Estimated Tax Payments
- Foreign Taxes Paid



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