



## Tax Prep Document Checklist

Taxpayer \_\_\_\_\_ Tax Year \_\_\_\_\_

This checklist is designed to serve as a reminder of items that may be needed to prepare your tax returns. It is not all-inclusive and there may be additional information or documentation needed for your tax preparation.

- Copies of last two year tax returns
- Driver's license or state identification
- Dependent name(s), date of birth, social security number
- Direct deposit information
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)
- Wages or Salary (Form W-2)
- Tip Income
- Scholarships (Forms W-2, 1098-T)
- Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage (Forms 1099-INT, 1099-DIV)
- Refund of state/local income taxes (Form 1099-G)
- Alimony income or separate maintenance payments
- Self-Employment income (Form 1099-MISC, 1099-NEC, cash, virtual currency, or other property or services)
- Cash/check/virtual currency payments, or other property or services for any work performed not reported on Forms W-2 or 1099
- Income (or loss) from the sale or exchange of Stocks, Bonds, Virtual Currency or Real Estate (including your home) (Forms 1099-S, 1099-B)
- Disability income (such as payments from insurance, or workers compensation) (Forms 1099-R, W-2)
- Retirement income or payments from Pensions, Annuities, and or IRA (Form 1099-R)
- Traditional IRA basis (i.e., amounts you contributed to the IRA that were already taxed)
- Unemployment Compensation (Form 1099G)
- Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)
- Income (or loss) from Rental Property (worksheet available)
- Transactions involving cryptocurrency (Virtual currency)
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)

- Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)
- Other income (gambling, lottery, prizes, awards, jury duty, Sch K-1, royalties, foreign income, etc.)
- Mortgage Interest (Form 1098)
- Real estate and personal property tax records
- Home Office Expenses (only self-employed, worksheet available)
- Energy Efficient Home Improvements
- Childcare records (including the provider's tax ID number) if applicable
- Adoption Expenses
- Charitable Contributions (cash or monetary)
- Charitable Contributions (non-cash, clothing, auto, securities, other)
- Amounts of miles driven for charitable or medical purposes
- Energy Efficient Vehicle Purchase
- Student Loan Interest (Form 1098-E)
- College Tuition (Form 1098-T)
- Other educational expenses
- Health Care Spending Account (HSA) Contributions (Form 5498-SA)
- Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- Retirement Plan or IRA Contributions (Form 5498)
- Amount of classroom expenses (for educators in grades K-12)
- Investment Interest
- Casualties & Theft Losses
- Foreign Income
- Record of quarterly estimated tax payments made (Form 1040-ES)