

Tax Prep Checklist

Employed

- Forms W-2

Unemployed

- Unemployment (1099-G)

Self-Employed - Worksheet (we will provide) filled out and included with your paperwork

- Forms 1099-MISC, 1099-NEC, 1099-K, Sch K-1 and income records to verify amounts not reported

Rental Income - Worksheet (we will provide) filled out and included with your paperwork

- Records of income and expenses (Worksheet provided if needed)
- Rental asset information (cost, date placed in service, etc.) for depreciation

Other Income & Losses

- Received Tip Income ____ NO ____ YES If yes, amount **NOT** included in W2/1099 \$ _____
- Retirement Income/Pension/IRA/annuity income (1099-R)
- Traditional IRA basis (i.e., amounts you contributed to the IRA that were already taxed)
- Social security/RRB income (SSA-1099, RRB-1099)
- Savings & Investments or Dividends Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-S)
- Dates of purchases & your cost basis in property you sold (if basis is not reported on 1099-B)
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- Transactions involving cryptocurrency (Virtual currency)
- Stock Incentives/Stock Options given by Employer
- Gambling income (W-2G or records showing income, as well as expense records)
- Jury duty records, Hobby income and expenses, Prizes and awards, Trust income
- State tax refund, Royalty income 1099-MISC, Any other 1099s received
- Record of alimony paid/received with ex-spouse's name and SSN

Home Ownership

- Forms 1098 or other mortgage interest statements
- Real estate and personal property tax records
- Receipts for energy-saving home improvements (e.g., solar panels, solar water heater)

Charitable Donations

- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Amounts of miles driven for charitable or medical purposes

Types of Deductions

- Medical Expenses - Amounts paid for healthcare, insurance, and to doctors, dentists, and hospitals
- Health Insurance: Form 1095-A if your insurance plan is through the Marketplace (Exchange)
- Childcare expenses (including the provider's address & tax ID number)
- Expenses paid through a dependent care flexible spending account at work
- Invoice showing amount of vehicle sales tax paid and / or personal property tax on vehicles
- Received the First Time Homebuyers Credit in 2008? ____ YES ____ NO
- Do you have a "Capital Loss Carryover" on Form 1040 Schedule D? ____ YES ____ NO
- Electric Vehicle Purchased (provide date purchased, Veh ID#, make and model)

Educational Expenses

- Forms 1098-T from educational institutions
- Forms 1099-Q for distributions from education savings plans
- Records of qualified educational expenses/scholarships not included on 1098-T
- Forms 1098-E if you paid student loan interest
- K-12 Educator expenses

Retirement & Other Savings

- Form 5498-SA showing HSA contributions
- Form 5498 showing IRA contributions