

Personal Tax Prep Checklist:

Personal

- Social security number or tax ID number
- Your spouse full name, social security number or tax ID number
- Amount of any alimony paid an ex spouse's full name and social security number
- If possible, your tax return for the previous year. It can be checked for accuracy.

Dependant(s)

- Dates of birth and social security number
- Childcare (including the provider's address and tax ID number or social security number)

Education

- Form 1098-T from educational institution
- Receipts for educational expenses
- Paid student loan interest
- Scholarships or fellowships received

Employee information

- W-2's
- Form 1099-MISC
- If self-employed, records of all expenses including vehicle expenses and in home office expenses if applicable

Rental Property Income

- Records of income and expenses
- Rental asset information (cost, date placed in service, etc.)

Retirement Income

- Pension/IRA/annuity income (1099-R)
- Social security/RRB income (1099-SSA, RRB-1099)

Savings and Investments

- Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-S)
- Dates of acquisition and records of your cost or other basis in property you sold

Other income

- Unemployment, state tax refund (1099-G)
- Gambling income (W-2G)
- Amount of alimony received
- Health Savings Account and long-term care reimbursements
- Jury duty records
- Hobby income and expenses

Other deductions and credits

- Receipts for classroom expenses (for educators in grades K-12)
- Record of moving expenses
- Form 1098 or other mortgage interest statements
- Real estate and personal property tax records
- Vehicle sales tax paid
- Donations and charitable miles
- Medical expenses
- Amount paid for last year's tax preparation
- Non-reimbursed employment related expenses
- Job-hunting expenses
- Energy-saving home improvements
- Estimated tax payments made