

# Tax Preparation Checklist

To assist us in finding every allowable deduction and credit you are entitled to, use the following list to help you organize your tax documents and information

- Driver's License(s)
- Social Security Card(s)
- Dependent's Social Security Card(s) and Date of Birth
- Form W-2 (Wage Statements)
- Form 1095A (Affordable Care Act documents)
- Form 1099-MISC (Self-Employed Business or Farm Income and Expenses)
- Form 1099-R (Pension and Retirement Income)
- Form 1099-INT (Interest Income)
- Form 1099-DIV (Dividend Income)
- Form 1099-G (State Income Tax Refund)
- Form 1099-G (Unemployment Income)
- Form 1099-B (Sales of Stocks or Bonds) {Include dates and purchase price and sales price of stocks and bonds}
- Form SSA-1099 (Social Security Income)
- Form W-2G (Lottery or Gambling Winnings)
- Scheduled K-1 (Income from Partnerships, S Corporations, Trusts, and Estates)
- Income and Expenses from Rentals
- Alimony Paid or Received
- Commissions Received
- Commissions Paid
- Lottery or Gambling Losses
- IRA Contributions
- Form 1098 (Mortgage or Home Equity Loan Interest Paid)
- Real Estate and Personal Property Taxes Paid
- Record of Purchase or Sale of Real Residence
- Casualty or Theft Losses
- Child Care Expenses and Provider Information
- Medical, Eye Care, and Dental Expenses
- Cash and Non-cash Charitable Donations
- Un-reimbursed Employment-Related Expenses
- Job-Related Educational Expenses
- Form 1098-T (Tuition and Education Fees)
- Form 1099-E (Student Loan Interest)
- Educator Expenses (For Teachers)
- Estimated Taxes Paid
- Foreign Taxes Paid
- Copy of Last Year's Federal and State Tax Return (If available)