



Tax Preparation Checklist and Items to Bring

Personal and Family Information

- Last Year's Tax Return
- Social Security Cards: You, spouse, and children/dependents
- Driver's License: You, spouse
- Green Card(s), if applicable
- Alimony paid: Social Security Number

Income-related Information

- Wage Statements: W-2 forms for this year
- Miscellaneous income such as rent: Forms 1099-MISC
- Pension or Retirement Income: 1099-R
- Unemployment compensation: Forms 1099-G
- Interest income statements: Form 1099-INT & 1099-OID
- Dividend income statements: Form 1099-DIV
- Proceeds from broker transactions: Form 1099-B
- Retirement plan distribution: Form 1099-R
- Partnership, S Corporation, & trust income: Schedules K-1
- Social Security/RR1 benefits: Forms RRB-1099
- Alimony received
- Jury duty pay
- Gambling and lottery winning
- Prizes and awards
- Scholarships and fellowships
- State and local income tax refunds: Form 1099-G

Expenses / Deductions Information

- Cash and non-cash contributions: Receipts from charitable organization
- Unreimbursed expenses related to volunteer work
- Unreimbursed work-related expenses (travel expenses, uniforms, union dues, subscriptions)

- Investment expenses
- Job-hunting expenses
- Job-related educational expenses
- Child care expenses: Qualifying child, amount paid; Child care provider : Name, address and tax I.D. or Social Security Number
- Medical Savings Accounts
- Adoption expenses
- Alimony paid: need name and SS#
- Tax return preparation expenses and fees
- Personal property tax for Auto
- Student loan interest paid
- Mortgage interest: Form 1098
- Sale of your home or other real estate: Form 1099-S
- Second mortgage interest paid
- Real estate taxes paid
- Moving expenses
- Medical & Dental expenses
- Casualty or theft losses
- Records for any other expenditures that may be deductible
- Records for any other revenue or sales of property that may be taxable or reportable

Self-employment or Other Business Information

- Business Income and Expenses: Forms 1099-MISC, etc.
- Business Asset list: description, cost, date placed in service, business use percentage, etc.
- Rental Income and Expenses by Property: Forms 1099-MISC, etc.
- Partnership Income: Schedules K-1
- Farm-related Income and Expenses: Receipts, other documents, etc.
- Employment taxes & other business taxes paid for current year: Payment records

Miscellaneous Tax Documents

- Estimated taxes paid for Federal: payment record
- Estimated taxes paid for State: payment record
- Estimated taxes paid for City: payment record
- IRA, Keogh and other retirement plan contributions: If self-employed, identify as for self or employees