



Tax Preparation Checklist

Use this checklist to help gather the appropriate tax preparation documents prior to your appointment.

PERSONAL INFORMATION

- Valid state-issued photo identification or passport
- Tax Identification Numbers (ITINs or SSNs) and birth dates for everyone included on your return (spouse, parents, children, etc.)
- Original social security card or ITIN authorization letter for taxpayer and spouse

LAST YEAR'S TAX RETURN

- Last year's tax return and amount paid for preparing the tax return
- Amount of state and local income tax paid

FORMS

- All forms that say W-2, 1098, 1099 or Schedule K-1
- Records of any contributions you made to IRAs or other retirement plans
- Records for mortgage interest, real estate and personal property tax
- Closing documents (such as the HUD statement) for a home you purchased

INCOME/INVESTMENTS

- Income & expense records for work you performed (not already shown on a W-2 or 1099)
- Records of other income (rental, jury duty, gambling, hobby, alimony, etc.) and expenses, if applicable
- Purchase date and your total investment in any stocks or other property you sold

CHARITABLE DONATIONS

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

DEDUCTIONS/EXPENSES

- Expenses related to your investments
- Amounts paid for health care insurance and to doctors, dentists, hospitals, etc.
- Records to support childcare (include provider ID number) and higher education costs
- Employment-related expenses (dues, travel, publications, tools, uniform costs and cleaning, etc.)
- Job search expenses and unemployment income, if applicable

If you have any questions, contact us today!

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