



# Tax Preparation Checklist

Use this checklist to help you gather your important tax information

## Personal Information

- Your social security number (ssn)
- Your spouse's full name & social security number
- Amount of any alimony paid and ex-spouse's ssn

## Other People who may belong on your return

- Names, dates of birth and social security numbers
- Childcare records (including provider's ID numbers)
- Approximate income of other adults in your home
- Form 8332, copies of your divorce decree, other documents

## Education Payments

- Bill from educational institutions
- Forms 1098-T & 1098-E
- Scholarships & fellowships

## Employee Information

- Forms W-2

## Self-Employment Information

- Forms 1099-MISC, Schedules K-1
- Expense records
- Check registers
- Credit card statements

## Vehicle Information

- Total miles driven for the year
- Total business miles driven
- Amount of parking & tolls paid
- Receipts (if claiming actual expenses)

## Rental Income

See rental income worksheet

## 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 (1099-B, 1099-S)
- Dates of acquisition and records of cost basis

## Other Income

- Unemployment, state tax refund (1099-G)
- Gambling Income (W-2G)
- Amount of alimony received
- Health care reimbursements (1099-SA)
- Jury duty records
- Hobby Income and expenses
- Prizes & awards

## Itemizing Deductions

- Medical expenses (see medical worksheet)
- Forms 1098 or other mortgage statements
- Amount of state/local income tax paid
- Real estate & personal property tax
- Cash amounts donated
- Records of non-cash donations
- Amounts paid for health care
- Expenses related to investments
- Amount paid for tax preparation
- Employment-related expenses
- Job-hunting expenses

## IRA Information

- Amount contributed
- Traditional IRA basis
- Value of IRAS on 12-31