

TAX PREP CHECKLIST

ALL FILERS

- ☐ Name as it appears on Social Security Card
- ☐ Copy of last year's return
- ☐ SSC for yourself, spouse, and dependents
- ☐ Dates of birth for yourself, spouse, and dependents
- ☐ Bank account number, and routing number
- ☐ Home Address
- ☐ Form 8832 if your dependent child's custodial parent is releasing their right to claim the child as a dependent

INCOME

- ☐ W-2'S
- ☐ 1099-G FORM FOR UNEMPLOYMENT INCOME
- ☐ 1099-INT, 1099-DIV, and 1099-B for Interest, dividends, and stock sales
- ☐ 1099-R and SSA-1099 for retirement plan distributions, and Social Security Benefits
- ☐ 1099-S for income from the sale of your home or other property

INCOME

- ☐ 1099-MISC for income from a rental property
- ☐ 1099-Q for distributions from a 529 plan / Coverdell ESA
- ☐ 1099-SA for distributions from a health saving account (HSA)
- ☐ Schedule K-1 for income from a pass-through business, trust, or estate
- ☐ Alimony received (if your divorce or separation agreement is dated on or before December 31, 2018)
- ☐ Records of any transactions involving cryptocurrency
- ☐ Information on other sources of income, such as gambling winnings, jury duty pay, cancellation of debt, etc.

SMALL BUSINESS OWNERS

- ☐ TAX ID
- ☐ 1099-NEC or 1099-K showing income as an independent contractor
- ☐ Insurance Premiums & Expenses
- ☐ Mileage Logs
- ☐ Documentation for home office expenses, including square footage of home and square footage of area used for business
- ☐ Records for business assets to be depreciated, including cost and date placed in service

TAX PREP CHECKLIST

1. DEDUCTIONS

- ☐ Out of pocket medical expenses
- ☐ Premiums for long term care insurance
- ☐ Form 1098 showing mortgage interest, premiums, and points paid by you
- ☐ Real estate taxes
- ☐ State and local income taxes
- ☐ Charitable donations
- ☐ Documentation of casualty losses (if you lived or owned property in a federally declared disaster area)
- ☐ Moving & Job Search Expenses
- ☐ Volunteer Expenses

TAX CREDITS

- ☐ Form 1098-T showing expenses for higher education
- ☐ Child care costs and care provider's name, address, and tax identification number
- ☐ Adoption costs and Social Security number child you legally adopted during 2022
- ☐ Form 1095-A if you purchase health insurance through the Health Insurance Marketplace

2. DEDUCTIONS

(ADJUSTMENTS TO INCOME YOU CAN CLAIM EVEN IF YOU DON'T ITEMIZE)

- ☐ Form 1098-E for student loan interest
- ☐ Records of contributions to an HSA, IRA, SEP or self-employed retirement plan
- ☐ Alimony paid (for divorce or separation agreements dated on or before December 31, 2018)
- ☐ For teachers, expenses paid for classroom supplies
- ☐ Premiums paid for self-employed health insurance
- ☐ Records for any stocks or other investments that became totally worthless or you expect to claim a loss, including date of purchase and original purchase price

S CORPORATION

- ☐ IRS acceptance letter of S election
- ☐ A copy of the business' bylaws and articles of incorporation. If an LLC taxed as an S corporation, copies of the LLC articles of organization and operating agreement
- ☐ EIN Number
- ☐ Information regarding any:
 - capital contributions, distributions or loans to shareholders.
 - reasonable compensation paid to any employee/shareholder
 - insurance plan provided to any shareholder
 - number of shares of all shareholders