



Use the tax checklist below to find the documents and forms you'll need to get started.

PERSONAL INFORMATION

- Your social security number or tax ID number
- Your spouse's full name and social security number or tax ID number

DEPENDENT(S) INFORMATION

- Dates of birth and social security numbers or tax ID numbers
- Childcare records (including the provider's tax ID number) if applicable
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

SOURCES OF INCOME

Employed

- Forms W-2

Unemployed

- Unemployment Income (Form 1099-G)

Self-Employed

- Forms 1099, Schedules K-1, income records to verify amounts not reported on 1099s
- Business related expenses
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Office in home – Square footage of office space and total square footage of home

- Record of estimated tax payments made (Form 1040-ES)

Rental Income

- Records of income and expenses
- Rental asset information (cost, date placed in service, etc.) for depreciation
- Record of estimated tax payments made (Form 1040-ES)

Retirement Income

- Pension/IRA/Annuity income (1099-R)
- Traditional IRA basis (i.e., amounts you contributed to the IRA that were already taxed)
- Social security/RRB income (1099-SSA, RRB-1099)

Savings & Investments or Dividends

- Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-5)
- Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)
- Health savings account and long-term care reimbursements (1099-SA or 1099-LTC)
- Expenses related to your investments
- Record of estimated tax payments made (Form 1040-ES)

Other Income & Losses

- Gambling income (W-2G or records showing income, as well as expense records)
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Trusts
- Royalty Income (1099-MISC)
- Any other 1099s received
- Record of alimony paid/received with ex-spouse's name and SSN

TYPES OF DEDUCTIONS

Home Ownership

- Forms 1098 or other mortgage interest statements
- Real estate and personal property tax records
- Receipts for energy-saving home improvements (e.g., solar panels, solar water heater)
- All other 1098 series forms

Charitable Donations

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

Medical Expenses

- Amounts paid for healthcare insurance and to doctors, dentists, hospitals (do not include medical expenses amounts paid through an HAS or insurance premiums paid through your work)

Health Insurance

- Form 1095-A, if you enrolled in an insurance through the Marketplace (Exchange)
- Form 1095-B and/or 1095-C, if you had insurance coverage through any other source (e.g., an employer, insurance company, or government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc.)

Childcare Expenses

- Amounts paid to a licensed daycare center or family daycare for care of infant or preschooler
- The name, address, and tax ID number of your daycare provider
- Wages paid to a baby-sitter

Educational Expenses

- Forms 1098-T from educational institutions
- Expenses for required books, equipment, and supplies
- Records of any scholarships or fellowships you received

- Form 1098-E, if you paid student loan interest

K-12 Educator Expenses

- Amounts paid for classroom supplies

State & Local Taxes

- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Invoice showing amount of vehicle sales tax paid

Retirement & Other Savings*

- Contributions to HSA accounts
- Contributions to ROTH IRA accounts
- Contributions to IRA accounts

***Do not include employer sponsored accounts**