Tax Preparation Check List

**Personal Information**

* Your social security number or tax ID number
* Your spouse's full name and social security number or tax ID number
* Amount of any alimony paid and ex-spouse's full name and social security number
* Your tax returns for the previous three years. Your Tax Professional can check them for accuracy

**Information About Other People Who May Belong on Your Return**

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

**Education Payments**

* Forms 1098-T from educational institutions
* Receipts that itemize qualified educational expenses
* Records of any scholarships or fellowships you receivedForm1098-E if you paid student loan interest

**Employee Information**

* Forms W-2

**Self-Employment Information**

* Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s
* Records of all expenses — check registers or credit card statements, and receipts
* Business-use asset information (cost, date placed in service, etc.) for depreciation
* Office in home information, if applicable

**Business Use of Vehicle Information**

* Log showing total miles driven for the year (or beginning/ending odometer readings), total business miles driven for the year (other than commuting), and the business purpose of the mileage
* Amount of parking and tolls paid
* If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

**Rental Property Income**

* Records of income and expenses
* Rental asset information (cost, date placed in service, etc.) for depreciation

**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 or other property (1099-B, 1099-S)
* Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)

**Other Income**

* Unemployment, state tax refund (1099-G)
* Gambling income (W-2G or records showing income, as well as expense records)
* Amount of any alimony received
* Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
* Jury duty records
* Hobby income and expenses
* Prizes and awards
* Other 1099

**Other Deductions and Credits**

* Receipts for classroom expenses (for educators in grades K-12)
* Form 5498-SA showing HSA contributions
* Record of moving expenses not reimbursed by employer
* Forms 1098 or other mortgage interest statements
* Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
* Real estate and personal property tax records
* Invoice showing amount of vehicle sales tax paid
* Cash amounts donated to houses of worship, schools, other charitable organizations
* Records of non-cash charitable donations
* Amounts paid for healthcare insurance and to doctors, dentists, hospitals
* Amounts of miles driven for charitable or medical purposes
* Expenses related to your investments
* Amount paid for preparation of last year’s tax return
* Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
* Job-hunting expenses
* Receipts for energy-saving home improvements
* Record of estimated tax payments made