



TAX PREP DOCUMENT CHECKLIST

BASICS FOR ALL FILERS

- SSN & DOB (*yourself & dependents*)
- Copy of last year's tax return
- Bank Account & Routing Numbers
- Loan Statements
- Valid Picture ID

INCOME

- W-2s
- 1099s for all forms of income (*DIV, INT, MISC, etc.*)
- Statements for gambling winnings, prizes, etc.

HOME & RENTAL PROPERTIES

- 1098s (*interest on Mortgage, equity, or student loans*)
- Paid Real Estate Taxes
- Insurance Premiums
- Energy Efficient Upgrade Receipts
- Purchase/Sale Records
- Rental Income
- Mileage
- Receipts

BUSINESS OWNERS

- Tax ID
- Insurance Premiums and/or Expenses
- Business Income and Expenses
- List of Assets and Equipment
- Mileage Logs

DEDUCTIONS

- Medical/Dental Expenses
- Health Insurance Payments
- IRA/401K & HSA Contributions
- Vehicle Purchase Sales Tax
- Childcare Expenses
- Job Search Expenses
- Moving Expenses
- Amount paid for last year's tax prep
- Educational Expenses (*loan interest, supplies, tuition*)

DONATIONS

- Charitable Contribution Receipts
- Volunteer Expense Deductions