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Tax Preparation Checklist

****Please use this checklist to help you gather your important tax information.**

PERSONAL DATA

- ☐ Social Security Numbers
(including spouse and children)
- ☐ Child care providers (including name,
address, and tax ID/Social Security Numbers)
- ☐ Alimony paid

EMPLOYMENT & INCOME DATA

- ☐ W-2 Forms for this year
- ☐ Unemployment Forms (1099-G)
- ☐ Miscellaneous income
(including rent, 1099-MISC)
- ☐ Partnership, S-Corporation, trust income
(Schedule K-1)
- ☐ Pensions and annuities (1099-R)
- ☐ Social Security/RR1 benefits (RRB-1099)
- ☐ Jury duty pay
- ☐ Gambling and lottery winnings
- ☐ Prizes and awards
- ☐ Scholarships and fellowships/grants
- ☐ State and local income tax refunds (1099-G)
- ☐ Alimony received

HOMEOWNER/RENTER DATA

- ☐ Residential addresses for this year
- ☐ Mortgage interest (Form 1098)
- ☐ Sale of your home or other real estate (1099-S)
- ☐ Second mortgage interest paid
- ☐ Real estate taxes paid
- ☐ Moving expenses

FINANCIAL ASSETS

- ☐ Interest income statements (1099-INT & 1099-OID)
- ☐ Dividend income statements (1099-DIV)
- ☐ Proceeds from broker transactions (1099-B)
- ☐ Retirement plan distribution (1099-R)

MISCELLANEOUS EXPENSES

- ☐ Gifts to charity
- ☐ Non-reimbursed expenses related to volunteer work
- ☐ Non-reimbursed expenses related to your job (travel,
uniforms, union dues, subscriptions, cell phones, etc.)
- ☐ Investment expenses
- ☐ Job-hunting expenses
- ☐ Job-related education expenses
- ☐ Tuition
- ☐ Child care expenses
- ☐ Medical expenses
- ☐ Adoption expenses
- ☐ Alimony paid
- ☐ Tax preparation fees

SELF-EMPLOYMENT DATA

- ☐ Business income
(1099-MISC, personal records)
- ☐ Partnership SE income (K-1)
- ☐ Advertisement expenses
- ☐ Automobile expenses
- ☐ Beginning/ending inventory
- ☐ Office expenses
- ☐ Telephone/Internet expenses
- ☐ Business miles
- ☐ Meals and Entertainment
- ☐ Assets acquired/sold
- ☐ Utilities
- ☐ Wages expense
- ☐ Any other business related expenses
- ☐ Farm-related expenses
- ☐ Employment taxes and other business taxes

MISCELLANEOUS TAX DOCUMENTS

- ☐ Federal, state, and local estimated income taxes
- ☐ IRA, and other retirement contributions
- ☐ Casualty or theft losses
- ☐ Revenue for sale of property/assets

Possible Legal Deductions

(List amounts for items you have – keep receipts for these deductions)

Medical and Dental: <input type="checkbox"/> Surgery\$ _____ <input type="checkbox"/> Prescriptions.....\$ _____ <input type="checkbox"/> Medical/Dental insurance.....\$ _____ <input type="checkbox"/> Hospital and emergency.....\$ _____ <input type="checkbox"/> Lab & X-Ray.....\$ _____ <input type="checkbox"/> Visiting nurses/In-home care.....\$ _____ <input type="checkbox"/> Dental.....\$ _____ <input type="checkbox"/> Glasses & contacts.....\$ _____ <input type="checkbox"/> Hearing aids & batteries.....\$ _____ <input type="checkbox"/> Orthopedic shoes.....\$ _____ <input type="checkbox"/> Therapy treatments.....\$ _____ <input type="checkbox"/> Canes/Crutches/Braces.....\$ _____ <input type="checkbox"/> Wheelchairs.....\$ _____ <input type="checkbox"/> Medical miles/Transportation.....\$ _____ <input type="checkbox"/> Other purchases on doctor's advice.....\$ _____ Taxes: <input type="checkbox"/> Real estate tax.....\$ _____ <input type="checkbox"/> Personal property tax.....\$ _____ <input type="checkbox"/> State income tax.....\$ _____	Contributions: <input type="checkbox"/> Church.....\$ _____ <input type="checkbox"/> College.....\$ _____ <input type="checkbox"/> United Way.....\$ _____ <input type="checkbox"/> March of Dimes.....\$ _____ <input type="checkbox"/> Other.....\$ _____ <input type="checkbox"/> Furniture or clothing (<i>must</i> have receipt)...\$ _____ <input type="checkbox"/> Given to _____ <input type="checkbox"/> Volunteer expenses.....\$ _____ (Church, School, Scout, etc.) <input type="checkbox"/> Volunteer miles driven.....\$ _____ Interest Paid: <input type="checkbox"/> Home mortgage interest.....\$ _____ <input type="checkbox"/> Points paid at closing.....\$ _____ <input type="checkbox"/> Investment interest.....\$ _____ Casualty Losses: <input type="checkbox"/> Accident, fire, theft, and natural disasters...\$ _____
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Miscellaneous and Employee Business Expenses:

<input type="checkbox"/> Uniform Cleaning.....\$ _____ <input type="checkbox"/> Work Tools.....\$ _____ <input type="checkbox"/> Union Dues.....\$ _____ <input type="checkbox"/> Safety shoes & gloves.....\$ _____ <input type="checkbox"/> Tax return preparation.....\$ _____ <input type="checkbox"/> Investment expenses.....\$ _____ <input type="checkbox"/> Teacher/School supplies.....\$ _____ <input type="checkbox"/> Cell Phone.....\$ _____	<input type="checkbox"/> Employment/Job seeking expenses.....\$ _____ <input type="checkbox"/> Sales/Entertainment.....\$ _____ <input type="checkbox"/> Office-in-home expense.....\$ _____ <input type="checkbox"/> Business travel.....\$ _____ <input type="checkbox"/> Vehicle use miles.....\$ _____ <input type="checkbox"/> Work miles (non-commute).....\$ _____ <input type="checkbox"/> Miles driven to second job.....\$ _____ <input type="checkbox"/> Other.....\$ _____
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Self-Employed Business Expenses:

<input type="checkbox"/> Advertising.....\$ _____ <input type="checkbox"/> Car & Trucking expenses.....\$ _____ <input type="checkbox"/> Legal & Professional services.....\$ _____ <input type="checkbox"/> Office Expenses.....\$ _____ <input type="checkbox"/> Rent or lease.....\$ _____ <input type="checkbox"/> Utilities.....\$ _____	<input type="checkbox"/> Repairs & Maintenance.....\$ _____ <input type="checkbox"/> Supplies.....\$ _____ <input type="checkbox"/> Taxes & Licenses.....\$ _____ <input type="checkbox"/> Meals.....\$ _____ <input type="checkbox"/> Travel.....\$ _____ <input type="checkbox"/> Other.....\$ _____
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Education Expenses:

<input type="checkbox"/> Student loan interest.....\$ _____ <input type="checkbox"/> Post-secondary, tuition & fees.....\$ _____	<input type="checkbox"/> Provider's SSN/EIN.....\$ _____ <input type="checkbox"/> Amount paid to provider.....\$ _____
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