

# TAX PREP CHECKLIST

### ALL FILERS

### INCOME

<ul> <li>Name as it appears on Social Security Card</li> <li>Copy of last year's return (preferred; not required)</li> </ul>	<ul> <li>1099-MISC for income from a rental property</li> <li>1099-Q for distributions from a 529 plan /</li> <li>Coverdell ESA</li> <li>1099-SA for distributions from a health</li> </ul>	
<ul> <li>SSC/Birth Certificate for yourself, spouse, and dependents</li> <li>Dates of birth for yourself, spouse, and dependents</li> <li>Bank account number, and routing</li> </ul>	<ul> <li>saving account (HSA)</li> <li>Schedule K-1 for income from a pass- through business, trust, or estate</li> <li>Alimony received (if your divorce or separation agreement is dated on or before December 31, 2018)</li> </ul>	
<ul> <li>number</li> <li>Home Address</li> <li>Form 8832 if your dependent child's custodial parent is releasing their right to claim the child as a dependent</li> <li>INCOME</li> </ul>	<ul> <li>Records of any transactions involving cryptocurrency</li> <li>Information on other sources of income, such as gambling winnings, jury duty pay, cancellation of debt, etc.</li> <li>SMALL BUSINESS OWNERS</li> </ul>	
<ul> <li>W-2'S</li> <li>1099-G FORM FOR UNEMPLOYMENT INCOME</li> <li>1099-INT, 1099-DIV, and 1099-B for Interest, dividends, and stock sales</li> <li>1099-R and SSA-1099 for retirement plan distributions, and Social Security Benefits</li> </ul>	<ul> <li>TAX ID</li> <li>1099-NEC or 1099-K showing income as an independent contractor</li> <li>Insurance Premiums &amp; Expenses</li> <li>Mileage Logs</li> <li>Documentation for home office expenses, including square footage of home and square footage of area used for business</li> </ul>	
1099-S for income from the sale of your home or other property	square footage of area used for business Records for business assets to be depreciated, including cost and date placed in service	



## TAX PREP CHECKLIST

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Out of pocket medical expenses

Premiums for long term care insurance

Form 1098 showing mortgage interest,

premiums, and points paid by you

### 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

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

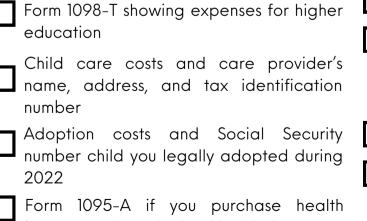
Real estate taxes
 State and local income taxes

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 1095-A if you purchase health insurance through the Health Insurance Marketplace