

# Tax Preparation Checklist

## Checklist of Information Needed to Complete Your Tax Return

If any item listed applies to you, check the box and attach the information

### Income Information

- |   |   |
|---|---|
| <input type="checkbox"/> Wages (Form W-2)   | <input type="checkbox"/> Stock Sale Information/Capital Gains (Form 1099-B) |
| <input type="checkbox"/> Interest Income (Form 1099-INT)  | <input type="checkbox"/> Pension Distributions (Form 1099-R)                |
| <input type="checkbox"/> Foreign bank accounts, income +/- or paid taxes                                  | <input type="checkbox"/> State / Local Refunds                              |
| <input type="checkbox"/> Dividend Income (Form 1099-DIV)  | <input type="checkbox"/> Gambling Income (Form W-2G)                        |
| <input type="checkbox"/> Stock Sale Information/Capital Gains (Form 1099-B)                               |   |
| <input type="checkbox"/> Each stock sale: Date purchased, number of shares bought, amount paid            |   |
| <input type="checkbox"/> Other Income   |   |
| <input type="checkbox"/> Alimony Received   | <input type="checkbox"/> Tip Income   |
| <input type="checkbox"/> Unemployment Compensation (Form 1099-G)  | <input type="checkbox"/> Scholarships (Form 1098-T)                         |
| <input type="checkbox"/> Social Security Benefits (Form 1099-SSA)   | <input type="checkbox"/> Education Savings Account Withdrawal (Form 1099-Q) |
| <input type="checkbox"/> Disability Income  | <input type="checkbox"/> Bartering Income (Form 1099-B)                     |
| <input type="checkbox"/> Jury Duty  |   |
| <input type="checkbox"/> Small Business (self-employed or independent contractor business owner) Business |   |
| <input type="checkbox"/> Income (Form 1099-MISC plus items not on 1099-MISC) Business Expenses            |   |
| <input type="checkbox"/> (Provide list or use the <b>Business Organizer</b> )                             |   |
| <input type="checkbox"/> Vehicle Information  |   |
| <input type="checkbox"/> Rental Property  |   |
| <input type="checkbox"/> Rental Income (Form 1099-MISC)   |   |
| <input type="checkbox"/> Related Expenses (Provide list or use the <b>Rental Property Organizer</b> )     |   |
| <input type="checkbox"/> Schedules K-1 from Partnerships, S Corps, Trusts                                 |   |
| <input type="checkbox"/> Sale of Real Estate not qualifying for Personal Residence Exemption Closing      |   |
| <input type="checkbox"/> Statement – Sale of Property   |   |
| <input type="checkbox"/> Closing Statement – Purchase of Property   |   |
| <input type="checkbox"/> List of additions/improvements while you owned the property                      |   |
| <input type="checkbox"/> Forgiveness of Debt income (Form 1099-C or 1099-A)                               |   |

### Deduction Information:

- |  |  |
|--|--|
| <input type="checkbox"/> IRA Contributions                         | <input type="checkbox"/> Medical Expenses  |
| <input type="checkbox"/> SEP, Simple, Keogh Plans                  | <input type="checkbox"/> Health Insurance  |
| <input type="checkbox"/> Student Loan Interest (Form 1098-E)       | <input type="checkbox"/> Out of Pocket Medical Expenses  |
| <input type="checkbox"/> Alimony Paid                              | <input type="checkbox"/> Form 1095-A   |
| <input type="checkbox"/> Recipient Name, SS #, Date of Divorce     | <input type="checkbox"/> Healthcare Market Place Exemption   |
| <input type="checkbox"/> Moving Expense (Only Military currently)  | <input type="checkbox"/> Real Estate Taxes   |
| <input type="checkbox"/> Mortgage Interest (Form 1098)             | <input type="checkbox"/> Other Taxes (including sales tax paid on the purchase of autos, boats and RVs for personal use) |
| <input type="checkbox"/> Investment Interest                       | <input type="checkbox"/> Employee Business Expense (Provide list or use the <b>Business Organizer</b> )                  |
| <input type="checkbox"/> Cash and Noncash Charitable Contributions |  |
| <input type="checkbox"/> Casualty/Theft Loss                       |  |

### Credit and Payment Information:

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|--|---|
| <input type="checkbox"/> Child Care Expenses   | <input type="checkbox"/> Tuition Statements (Form 1098-T) & Education Expenses            |
| <input type="checkbox"/> Provide name, address, SS# or EIN, and amount paid for each child                       | <input type="checkbox"/> Copy of voided check (for direct deposit of refund information)  |
| <input type="checkbox"/> Estimated tax payments (dates and amounts paid)   | <input type="checkbox"/> Energy or vehicle tax credit information Legal                   |
| <input type="checkbox"/> Papers for adoption, divorce or separation involving custody of your dependent children | <input type="checkbox"/> Closing statement for first-time or long-time homebuyers' credit |