



Tax Preparation Checklist

Personal Information:

- **Tax Payer and Spouse's Social Security Number, ITIN, or TIN**
- **Tax Payer and Spouse's Dates of Birth**
- **Valid Government ID**
- **Identity Protection PIN (if applicable)**
- **Current address phone number, and email addresses**

Dependent Information:

- **Dependent date(s) of birth and social security number(s)**
- **Child care provider information, including tax ID number**
- **Dependent Income**
- **Proof of residency and relationship (Non-Biological Dependent)**
- **Form 1098T - College Students**
- **Dependent disability statement**

Income Information:

- **Employed: W-2 Forms**
- **Unemployed: 1099-G**
- **Self-Employed: 1099 / Schedule K-1 /1099-NEC / Receipts**
- **Rental Property Income**
- **Retirement Income: 1099-R / SSA-1099 / RRB-1099**
(Pension, Traditional IRA, Social Security, RRB)
- **Savings & Investments or Dividends: 1099-INT / 1099-OID / 1099 - DIV**
(Interest & Dividends, Health Savings Account, Long-term care reimbursements, Cryptocurrency, Gambling Income)



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Deductions:

- **Home Ownership:**
(Form 1098, Real estate & personal property tax records, energy saving home improvements)
- **Charitable Donations:**
(Cash and non-cash donation records, amount of mileage driven for charitable organization)
- **Medical Expenses: 1095-A Marketplace Exchange**
(Amounts paid for healthcare, insurance, and mileage driven to and from appointments)
- **Childcare Expenses**
(Amounts paid to a provider or via dependent flexible spending account)
- **Educational Expenses: 1098-T / 1098 - E**
(Receipt of itemized expenses, a record of scholarship)
- **K-12 Educator**
(Classroom expenses receipt, sales tax paid, vehicle or personal property taxes paid)
- **Retirement & Other Savings: Form 5498**
Federally Declared Disaster
(City or county of disaster, receipt of property losses, receipt of repair cost, insurance reimbursement or FEMA assistance)