**Tax Documents Checklist**

Documents and information you need to bring to your tax preparer.

First time clients with tax preparer should bring your last year tax return.

**Personal information**

Your Social Security number or Tax Id Number

Your spouse Social Security number or Tax Id number

**Dependent(s) Information**

Date of birth social security or Tax Id number

Childcare records (including provider’s Tax Id number)

Income of other adults in your home

Form 8332 showing that the child’s custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

**Sources of income**

**Employed**

 Forms W-2

**Unemployed**

 Unemployment, state tax refund (1099-G)

**Self Employed**

Form 1099-MIsc

Record of all expenses – check register or credit card statement, and receipts

Business-use asset information (cost, date placed in service) for depreciation

Office in home information, if applicable

 **Rental Income**

Record of income and expenses

Rental Assets information (cost, date placed in service) for depreciation

Record of estimate tax payments made (Form 1040ES)

**Retirement Income**

Pension/IRA/ annuity (1099-R)

Social Security/RRB (1099-SSA, RRB-1099

**Saving & Investment or Dividends**

Interest, dividend income (1099- INT, 1099-DIV)

Income from Sales of Stock or other property (1099-B, 1099-S)

Dates of acquisition and record of your cost or other basis in property you sold (If basis is not reported on 1099-B)

Health Saving Account and long-term care reimbursements (1099-SA or 1099LTC)

Expenses related to your investments

Record of Estimated tax payments made (1040ES)

**Other Income & losses**

Gambling Income (W-2G or records showing income, as well as expense record)

Jury duty records

Hobby Income and expenses

Prizes and awards

Trusts

Royalty Income (1099-MISC)

Any Other 1099s received

**Type of deductions**

**Home ownership**

Form 1098 or other mortgage interest statements

Real Estate and personal property tax records

Receipts for energy-saving home improvements

All other 1098 series forms

**Charitable Donations**

Cash amounts donated to houses of worship, schools, and other charitable organizations

Records of non-cash charitable donations

Amount of miles driven for charitable or medical purposes

**Medical Expenses**

Amounts paid for health insurance and to doctors, dentist, and hospitals

**Health Insurance**

Form 1095-A if you enrolled in a insurance plan through the marketplace

Form 1095-B and/or 1095-C if you had insurance through any source

Marketplace exemption certificate (ECN) if you applied for and received an exemption from the marketplace

**Childcare Expenses**

Fees paid to a licensed day care center or family day care for the care of an infant or preschooler

Wages paid to a baby-sitter

**Educational Expenses**

Forms 1098-T from educational institutions

Receipts that itemize qualified educational expenses

Record of any scholarship or fellowship you received

Form 1098-E if you paid student loan interest

**State and Local or Sales Taxes**

Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax

Invoice showing amount of vehicle sales tax paid

**Retirement or Other Savings**

Form 5498-SA showing HSA contribution

Form 5498 showing IRA contribution

All other 5498 series forms

**Federally Declared Disaster**

City/county you lived/worked/had property in

Records to support property losses (appraisal, clean-up costs, etc.)

Record of rebuilding/repairs costs

Insurance reimbursements/ claims to be paid

FEMA assistance information

Check FEMA site to see if my county has been declared a federal disaster area