

Tax Preparation Checklist

A tax preparation checklist is a comprehensive list of documents and information to efficiently prepare and file taxes. It typically includes items such as W-2 forms, 1099 forms, receipts for deductions, bank statements, and previous tax returns. Having a checklist helps ensure that nothing is overlooked, which makes the tax filing process smoother and more organized. It serves as a valuable tool for both individuals and businesses to stay on track during tax season.

For ALL Filers

- Copy of Last Year's Tax Return**
- Social Security Numbers**
(Yourself, Your Spouse & Dependents)
- Dates of Birth**
(Yourself, Your Spouse & Dependents)
- Bank Accounts**
(Routing numbers & Account numbers)
- Loan Statements**

Income

- W-2 Forms**
- 1099s for All Forms of Income**

Home & Rental Properties

- 1098s:** *Interest on Mortgage, Equity or Student Loans*
- Paid Real Estate Taxes**
- Insurance Premiums**
- Energy Efficient Upgrade Receipts**
- Rental Income**
- Mileage & Receipts for Rental Repairs & Upgrades**

Donations

- Charitable Contribution Receipts**
- Volunteer Expense Deductions**

Business Owners

- Tax ID**
- Insurance Premiums & Expenses**
- Business Income & Expenses**
- List of Assets & Equipment**
- Mileage Logs**

Deductions

- Medical/Dental Expenses**
- Health Insurance Payments**
- IRA and HSA Contributions**
- Vehicle Purchase Sales Tax**
- Childcare Expenses**
- Job Search Expenses**
- Moving Expenses**
- Amount Paid for Last Years Tax Prep**
- Educational Expenses**
(Loan Interest, Supplies, Tuition)

Other Miscellaneous

- Estimated Tax Payments**
(Self-employed)
- IRA / 401K Total Contributions**

