

# PERSONAL TAX PREPARATION CHECKLIST

## PERSONAL INFORMATION

For you, your spouse and your dependents.

- |  |   |
|--|---|
| <input type="checkbox"/> Full Legal Name(s)                            | <input type="checkbox"/> Date(s) of birth       |
| <input type="checkbox"/> Social Security Number(s) or Tax ID Number(s) | <input type="checkbox"/> Last Year's Tax Return |

## INCOME

How did you make money this year? Gather the documents that apply to your situation.

- |  |   |
|--|---|
| <input type="checkbox"/> <b>Personal Income Statements</b><br>W-2 for each job held during the tax year by you, your spouse and any dependents.<br>Self-employed? All financial records, as well as all Forms 1099-MISC. | <input type="checkbox"/> <b>Unemployment Compensation and State Tax Refunds</b><br>Form 1099-G      |
| <input type="checkbox"/> <b>Investment or Interest Income Statements</b><br>Forms 1099-INT, 1099-DIV, 1099-OID and 1099-B, as well as the Schedule K-1.  | <input type="checkbox"/> <b>HSA and Long-Term Care Reimbursements</b><br>Forms 1099-SA and 1099-LTC |
| <input type="checkbox"/> <b>Pension/IRA/Annuity Income</b><br>Form 1099-R  | <input type="checkbox"/> <b>Social Security/RRB Income</b><br>Forms SSA-1099 and RRB-1099           |
| <input type="checkbox"/> <b>Income From Home or Property Sale</b><br>Form 1099-S   | <input type="checkbox"/> <b>Trust and Estate Beneficiary Earnings</b><br>Form 1041                  |

**Running a Small Business?** We've got you covered. Check out the [Small Business Tax Checklist](#).

## DEDUCTIONS

**Make sure you don't miss out on deductions and credits you qualify for.**



Do you own a house?



Did you pay for childcare?



Did you contribute to an IRA or Health Savings Account?



Did you have a big life change this year?

Check out some common options on the back.

Work with a tax advisor to get every dollar you've earned.

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## COMMON DEDUCTIONS

Do you qualify for any of these deductions? Here's what you'll need if you do.

- Homeowner Expenses**  
Mortgage interest statements (Form 1098), property tax payment receipts, energy efficient upgrade receipts (Form 5695) and qualified moving expense receipts for work-related moves more than 50 miles.
- Education Expenses**  
Tuition statements, itemized receipts of qualified educational expenses (Form 1098-T) and student loan interest statements (Form 1098-E).
- Charitable Contributions**  
Detailed list of donations, receipts for contributions over \$250 and Form 1023 for vehicle donations.
- Self-Employment Expenses**  
Records of business/home-office expenses, assets, pension plan contributions, health insurance payments and estimated tax payment receipts (state and federal).
- Child and Dependent Care Expenses**  
Name, address and tax ID or Social Security number of the provider.
- Health Care Expenses**  
Records of medical and dental costs.
- Alimony Expenses**  
Your ex spouse's full name and Social Security number.
- Job Hunting and Job-Related Educational Expenses**  
Records of expenses
- IRA Contributions**  
Form 5498
- Health Savings Account Contributions**  
Form 5498-SA
- Tax Payments**  
Receipts for all state and federal taxes, property taxes, vehicle license fees and sales tax.
- Tax Preparation Expenses**  
Receipt for having last year's taxes professionally prepared.



### HAVE QUESTIONS?

Our tax advisors can help you make sense of all the paperwork so you don't miss any deductions.

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