

Tax Prep Checklist

Taxes are complicated. With over 70,000 pages in our U.S. tax code, it can be difficult to figure out what you need to report to stay compliant with the IRS. This personal tax prep checklist is a great starting point to help you tackle your taxes. Here's what you'll need:

Personal information

- Social Security numbers/tax ID numbers for you, your spouse, & your dependents
- Copy of last year's tax return (optional)
- Bank account number & routing number (only needed if you're depositing your refund directly)

State & local taxes or sales tax

- Amount paid for state/local income tax or state/local sales tax
- Invoice of vehicle sales tax paid

Homeowner/Renter info

- Residential address(es) for the year
- Mortgage interest: 1098 form
- Real estate & personal property tax records
- Receipts for energy-saving tax records
- Income from sale of a property: 1099-S forms
- Rent paid during tax year
- Real estate taxes paid
- Second mortgage interest paid

General income

- Employment income: W-2 forms (if employed) for both you & your spouse
- Unemployment income or state/local tax refunds: 1099-G form
- Independent contractor work income: 1099-MISC

If self-employed:

- Depreciation Schedule
- Records of all expenses (include vehicle expenses and mileage information)
- Record of estimated tax payments made
- Home office information

- Alimony received
- Jury duty pay
- Gambling and lottery winnings: Form W-2G
- Prizes & awards
- Scholarships & fellowships
- Partnership, S corp, & trust income: K-1 Forms
- Pensions & annuities
- Rental income
- Any other 1099 income (1099-C form, etc.)

Medical expense & health insurance

- Medical & dental expense records
- Health insurance

For health insurance:

- Enrollment in insurance plan through the Marketplace: Form 1095-A
- Proof of insurance coverage through another source (e.g., employer, insurance company, etc.): Form 1095-B and/or 1095-C
- Marketplace exemption certificate if you received an exemption from the Marketplace

Education expenses

- Tuition paid: Form 1098-T
- Student loan interest paid: Form 1098-E
- Receipts for qualified educational expenses
- Records of scholarships or fellowships

Childcare expenses

- Amount paid to licensed day care center/family day care
- Amount paid to babysitter
- Name, address, & tax ID for each childcare provider

Retirement expenses

- Payments/Distributions from IRS or retirement plans: 1099-R
- Social Security/RRB income: 1099-SSA, RRB-1099 forms
- IRA contributions: Form 5498
- HSA contributions: Form 5498-SA
- Any other 5498 series forms

Charitable donations

- Amounts donated to schools, houses of worship, and other charitable organizations and records of donations

Proof must be given if the amount donated is equal to or above \$500.

- Miles driven for charitable or medical purposes

Alimony paid

- Social Security number for person receiving alimony
- Name of person receiving alimony
- Copy of order

Federally declared disaster

- Where you lived (city/county)
- FEMA assistance information
- Insurance reimbursement/claims
- Records of rebuilding/repair costs
- Records to show property losses (clean-up costs, appraisals, etc.)

Tax preparation

- Amount paid for last year's tax return prep

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