

PERSONAL - Tax Preparation Checklist



| Basic Info | You | Spouse | Dependents |
|---|--------------------------|--------------------------|--------------------------|
| Name, SSN or TIN, and Date of Birth (photo ID) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Last Year's Return | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Bank Account Number and Routing Number, if direct depositing refund | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Prior Year Self-Select Pin or Adjusted Gross Income (AGI) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

| Income Info | You | Spouse | Dependents |
|--|--------------------------|--------------------------|--------------------------|
| W-2 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 1099-NEC, -MISC (independent contractor) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 1099-INT, -DIV, -B, or K-1 (investment or interest income) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 1099-C (cancellation of debt) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 1099-G (unemployment income; state or local tax refunds) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 1099-R (payments/distribution from IRAs or retirement) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 1099-S (income from sale of a property) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| SSA-1099 (social security benefits) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Business or Farming Income (profit/loss statement) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Rental Property Income and Expenses | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Jury Duty, Gambling Winnings, Scholarships | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Medical Savings Account | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

| Adjustments to Your Income | You | Spouse | Dependents |
|---|--------------------------|--------------------------|--------------------------|
| 1098-E (student loan interest paid) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 1098-T (tuition paid or receipts/canceled checks for tuition paid for post-high school) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| For Teachers – cancelled checks or receipts for expenses paid for classroom supplies | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| IRA Contributions | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

| | | | |
|---|--------------------------|--------------------------|--------------------------|
| Energy Efficient home improvements Receipts | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Medical Savings Account Contributions | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Self-employed health Insurance Payment | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Keogh, SEP, SIMPLE, and other self-employed pension plans | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

| Deductions - Credits – Records | You | Spouse | Dependents |
|--|--------------------------|--------------------------|--------------------------|
| Child Care Costs – provider’s name, address, tax ID, and amount paid | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Education Expenses | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Adoption Costs – SSN of child, records of legal, medical and transportation costs | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 1098 Mortgage Interest Paid, Private Mortgage Insurance (PMI), and Points You Paid | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Real Estate Taxes | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Personal Property Taxes | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| State and Local Income Taxes Paid | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Vehicle License Fees based on value of vehicle | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Charitable Contributions | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Medical and Dental Expenses | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Investment Interest Expenses | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Estimated Taxes Payments made during year | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Prior-Year Refund Applied to Current Year | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Foreign Earned Income | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Foreign Taxes Paid | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 1095, 1095-A, 1095-B (health coverage) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Crypto Currency | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |