

TAX PREPARATION CHECKLIST

Personal Information

- ID Card (or DL Card)
- Social Security Card & DOB

Personal Income

- W-2 forms
- Unemployment Comp. 1099-G
- All Form 1099s
- Partnership, S-Corp: Schedule.K-1
- Jury Duty Pay

Personal Expenses

- Childcare information and expenses
- Student Loan Interest
- Mortgage Interest (Form 1098)
- DMV fees
- Charity
- Medical Expenses (incl mileage) and Health insurance payments
- Real Estate Taxes
- Investment expenses
- Adoption Expenses
- Tuition Fees and expenses for education (Form 1098T)
- Sales tax from vehicle purchase

Contribution

- IRA/HSA
- Roth IRA

Payment

- Estimated Tax Payment (IRS and State)

Other

- Information for electric and plug-in hybrid car purchased
- Health Insurance (Form 1095A or B or C)
- Detailed Business Income and Expenses (Schedule C)
- Mileage for Schedule C
- Detailed Rental Income and Expenses (Schedule E)
- Mileage for Schedule E