

# Tax Prep

## CHECKLIST

### For All Filers

- Copy of Last Year's Tax Return
- Social Security Numbers(yourself, spouse and dependents)
- Dates of Birth (yourself, spouse and dependents)
- Bank Accounts/Routing numbers
- Loan Statements

### Income

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

### Home & Rental Properties

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

### Donations

- Charitable Contribution Receipts
- Volunteer Expense Deductions

### Business Owners

- Tax ID
- Insurance Premiums and Expenses
- Business Income and Expenses
- List of Assets and Equipmet
- Mileage Logs

### Other Miscellaneous

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

### 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 Year's Tax Prep
- Educational Expenses(Loan Interest, Supplies, Tuition)