



Don't forget to bring all the documents needed to prepare your tax return! Look through this checklist and bring all the items that apply to your tax situation to help ensure accuracy and the best possible refund.

Tax Payer Personal Information

- ⇒ Valid State Identification
- ⇒ Valid Social Security Cards of all dependents including spouse and children
- ⇒ Childcare provider information with business address and tax identification number and/or social security number
- ⇒ Social security number of ex-spouse to who any alimony was paid

Employment & Income Information

- ⇒ Standard W-2 forms
- ⇒ Unemployment compensation (Form 1099-G)
- ⇒ Pensions and annuities (Forms 1099-R)
- ⇒ Social Security/RR1 benefits (Forms RRB-1099)
- ⇒ Amount of Alimony received
- ⇒ Jury duty if not paid to employer
- ⇒ Documented gambling and lottery winnings

Financial Assets

- ⇒ Savings Interest income statements (Form 1099-INT)
- ⇒ Investments Dividend income statements (Form 1099-DIV)
- ⇒ Retirement plan distribution/draw downs (Form 1099-R)

Financial Liabilities

- ⇒ Auto mileage and loan information if vehicle used for business
- ⇒ Student loan interest paid
- ⇒ Early withdrawal penalties on CDs and other time deposits

Homeowner/Renter Information

- ⇒ Residential address for the current tax year
- ⇒ Mortgage interest (Form 1098)
- ⇒ Sale of your home/real estate (Form 1099-S)
- ⇒ Interest on second mortgage
- ⇒ Real estate taxes paid
- ⇒ Moving expenses if move was related to job and not reimbursed by employer

Personal/Business Expenses

- ⇒ Documented Medical Expenses
- ⇒ Documented Charity Gifts
- ⇒ Job expenses related that have not been reimbursed by your employer (travel expenses, uniforms, union dues, subscriptions)
- ⇒ Child care expenses
- ⇒ Alimony paid

Self-employment Data

- ⇒ Business income (Form 1099-MISC and/or personal records)
- ⇒ Partnership SE income
- ⇒ Business Expenses (receipts)
- ⇒ Employment taxes & other business taxes paid for current year (personal records)