

Tax Information Checklist

We've designed this checklist as your personal guide to help prepare you for your visit.

Personal Information

- ☐ Full legal names of taxpayer, spouse, and dependents as shown on Social Security Card
- ☐ Social Security Numbers (including spouse and dependents)
- ☐ Date of births

Employment & Income Information

- ☐ W-2 forms for this year

Homeowner Information

- ☐ Residential address(es) for this year
- ☐ Form 1098: Mortgage interest
- ☐ Form 1099-S: Sale of your home or other real estate
- ☐ Second mortgage interest paid
- ☐ Real estate taxes paid
- ☐ Moving expenses

Financial Assets Information

- ☐ Form 1099-INT & 1099-OID: Interest income statements
- ☐ Form 1099-DIV: Dividend income statements
- ☐ Form 1099-B: Proceeds from broker transactions
- ☐ Form 1099-G: Tax Refunds & unemployment compensation
- ☐ Form 1099-MISC: Miscellaneous income including rent
- ☐ Form 1099-R: Retirement plan distribution
- ☐ Schedule K-1: Partners share of partnership investments
- ☐ Rental property: Information on gross rents and itemized expenses
- ☐ Annual brokerage statements indicating investment sales along with investment cost information

Financial Liabilities Information

- ☐ Auto loans and leases (account numbers and car value) if vehicle used for business
- ☐ Student loan interest paid

Automobile Information

- ☐ Personal property tax information
- ☐ Expenses for use and miles driven if vehicle used for business, charity, and medical

Expenses Information

- ☐ Gifts to charity (receipts for any single donations of \$250 or more)
- ☐ Unreimbursed expenses related to volunteer work
- ☐ Unreimbursed expenses related to your job (travel expenses, uniforms, union dues, subscriptions)
- ☐ Investment expenses
- ☐ Job-hunting expenses
- ☐ Education expenses
- ☐ Child care expenses with child care provider tax I.D. or social security number and address

Self-Employment Information

- ☐ Income and Form 1099-MISC
- ☐ Inventory information
- ☐ Receipts or documentation for business-related expenses
- ☐ K-1s on all partnerships

Deductions Information

- ☐ State & local income tax payments
- ☐ IRA contributions
- ☐ Medical expenses
- ☐ Casualty or theft losses
- ☐ Other miscellaneous deductions