

TAX PREP CHECKLIST

WHAT YOU NEED FOR A SUCCESSFUL TAX SEASON



PERSONAL INFORMATION

SSN or ITIN, full names and birth dates for everyone included on your return
Amount of alimony paid and ex-spouse's social security number
Childcare records (including the provider's ID number) if applicable



INCOME-INVESTMENTS-RETIREMENT

All forms that say W-2, 1098, 1099, or Schedule K-1
Purchase date and total investments in any stocks or property you sold
Expenses related to your investments
Records of any contributions you made to IRAs, other retirement plans, and 529 plans or education savings account
Records of business income and expenses if you are an independent contractor, self-employed, or own real estate



EDUCATION

Education scholarships and fellowships
Records of tuition and other higher education expenses, and Form 1098-T



ITEMIZED DEDUCTIONS

Form 1098
Mortgage interest, real estate, and personal property tax records
Prior years amount of state/local income tax paid (contact us if you have sales tax records for large purchases)
Records of cash amounts donated to houses of worship, schools, and other charitable organizations
Records of non-cash charitable donations (i.e. dues, travel, publications, tools, uniform cost, and cleaning)



HEALTHCARE

Form 1095-A, if you enrolled in an uninsured plan through the Marketplace (Exchange)
Marketplace exemption certificate if you applied for and received an exemption from the Marketplace (Exchange)
Form 1095-B or Form 1095-C, if you have insurance through a private plan or employer plan
HSA information (Forms 5498, 1099-SA) and receipts for medical expenses