

Tax Prep Checklist

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Personal Information	
Your social security number or tax ID numbe	r
Your spouse's full name and social security r	number or tax ID number
Amount of any alimony paid and ex-spouse's	s full name and social security number
Your tax returns for the previous three years, them for accuracy	. Your Tax Professional can check
Information for others on y	our return
Dates of birth and social security numbers or	
Childcare records (including the provider's ta	x ID number) if applicable
Income of other adults in your home	
Form 8332 showing that the child's custodial a child to you, the noncustodial parent (if app	
Employee Information Rer	ntal Property Income
Forms W-2	Records of income and expenses
(\$) <u> </u>	Rental asset information (cost, date placed in service, etc.) for depreciation
Forms 1099-MISC, Schedules K-1, income roon 1099s Records of all expenses — check registers of Business-use asset information (cost, date poffice in home information, if applicable	or credit card statements, and receipts
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Bus	iness Use of Vehicle 🛮 🦳
	Log showing total miles driven for the year (or beginning/ending odometer readings), total business miles driven for the year (other than commuting), and the business purpose of the mileage
	Amount of parking and tolls paid
	If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.
Ot	her Deductions and Credits
	Form 5498-SA showing HSA contributions
	Record of moving expenses not reimbursed by employer
	Forms 1098 or other mortgage interest statements
	Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
	Real estate and personal property tax records
	Invoice showing amount of vehicle sales tax paid
	Cash amounts donated to houses of worship, schools, other charitable organizations
	Records of non-cash charitable donations
	Amounts paid for healthcare insurance and to doctors, dentists, hospitals
	Amounts of miles driven for charitable or medical purposes
	Expenses related to your investments
	Amount paid for preparation of last year's tax return
	Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
	Job-hunting expenses
	Receipts for energy-saving home improvements
	Record of estimated tax payments made
Ot.	her Income
П	Unemployment, state tax refund (1099-G)
	Gambling income (W-2G or records showing income, as well as expense records)
	Amount of any alimony received
□	Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
	Jury duty records
	Hobby income and expenses
	Prizes and awards
	Other 1099

