

Tax Checklist

Personal Information

- Birth dates & social security numbers of you, your spouse, or any dependents that you are filing for
- A copy of your most recent tax return (optional)
- Bank account number and routing number (only if you want to direct deposit your refund)

Forms and Income Information (not all may apply to you)

- W-2 forms for both you and your spouse
- 1099-C forms
- 1099-G forms
- 1099-MISC
- 1099-R
- 1099-S
- 1099-INT, DIV, B, K-1
- SSA-1099
- Any alimony received/paid
- Business profit/loss statement
- Any rental property income and expense
- Prior year installment sale information
- Any other miscellaneous income

Income Adjustments

- Form 1098-E (Student loan information)
- Form 1098-T (Tuition paid information)
- For teachers: any receipts for classroom supply expenses
- Records of IRA Contributions

- Receipts for qualifying energy-efficient home improvements
- Records of Medical Savings Account contributions
- Self-employed health insurance payment records
- Moving expense records
- Self-employed pension records

Deductions

- Child care costs
- Education costs
- Adoption costs
- Form 1098
- Investment interest expenses
- Charitable donation records
- Medical & dental expense records
- Casualty & theft losses
- Home business expenses

Taxes Paid

- State, local, real estate, personal property, etc...

Other Information

- Self-employed tax payments
- Prior-year refund
- Foreign bank account information