

Tax Prep Documents Checklist

The documents you need for tax prep depend on your situation. To help you prepare for your tax appointment or for filing your own taxes, we've created a checklist to help you know what forms to bring.

Basic Information

Personal Information:

- Birthdates for both you and your spouse
- Current address
- Identity Protection PIN (IP PIN), if applicable
- Photo ID
- Social Security numbers for both you and your partner (if applicable)

Dependents' Information:

- Names, birthdates, and Social Security numbers of dependents
- Form 8832 if a non-custodial parent has released the right to claim dependents
- Income documents for dependents if their taxes are filed by our office

Income

Employment Income:

- W-2 form(s)

Business Income and Records:

- Sole proprietorship income (1099-NEC)
- Farm and fishing income
- Income from partnerships and S-Corporations (Form K-1)
- Other 1099 income records: 1099-K, 1099-MISC
- Non-1099 income records: cash and other income
- Estimated tax payments
- Expense records

Retirement or Disability Benefits:

- Railroad retirement & Social Security income (SSA-1099, RRB-1099)
- Retirement income (1099-R)

Unemployment Income:

- Unemployment compensation (1099-G)



Investment and Asset Records:

- Cryptocurrency
- Dividend income (1099-DIV)
- Interest income (1099-INT, 1099-OID)
- Rental income, expenses, and tax payments
- Real estate sales (1099-S)
- Stock or land sales (1099-B)
- Investment expenses

Other Income Sources:

- Alimony (agreements before 2019)
- Hobby income
- Income from trusts
- Jury duty
- Miscellaneous income (1099-MISC)
- Prizes, lottery, or gambling winnings
- Royalties
- Scholarships/fellowships for personal use
- State tax refund(s) (1099-G)
- Other income records

Deductions

Parents and Caretakers Deductions:

- Adoption expenses
- College expenses for dependents
- Dependent care expenses: provider address, ID number, and amounts paid

Car Owner Deductions:


- Electric vehicle purchase info
- Personal property taxes paid

Homeowner Deductions:

- Home mortgage interest (Form 1098)
- Second mortgage interest
- Real estate taxes
- First-time homebuyer information (2008 repayment)
- Energy credits for home improvements

Charitable Donations:

- Charitable cash donations

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- Non-cash donations

Savings Deductions:

- Health savings account deductions (1099-SA, 5498-SA)
- IRA contributions
- Retirement savings contributions

Medical/Health Deductions:

- Form 1095-A if you enrolled in a Marketplace health plan
- Insurance premiums not covered by the Marketplace or employer
- Payments for healthcare, insurance, and medical services

Education Expenses:

- Education expenses
- K-12 educators' expenses
- Scholarships
- Student loan interest
- Tuition expenses (1098-T)

Federal Disaster Area Deductions:

- Insurance reimbursements and FEMA assistance claims
- Expenses for rebuilding/repair
- Property loss documentation (appraisal, cleaning costs)

Other Tax Deduction Checklist:

- Casualty and theft losses
- Miles traveled for volunteer work
- Unreimbursed volunteer expenses
- Personal property taxes for boats or other property

Bank and Prior Tax Return Info:

- Bank account and routing number or a voided check for direct deposit
- Bank name and account type (savings or checking)
- Copy of last year's tax return
- Last year's tax preparation fee