

# Tax Preparation Checklist

**Please use the checklist as a reference and bring all other necessary documents to ensure your taxes can be prepared accurately.**

- **Social Security card and dates of birth for you, your spouse, your dependents**
- Copies of last year's tax return for you and your spouse (helpful, but not required)
- Bank account number and routing number, if depositing your refund directly into your account
- Form 1095-B or Form 1095-C ( proof of Health Care)

## Information about your income

- W-2 forms for you and your spouse
- 1099-MISC forms for you and your spouse (for any independent contractor work)
- 1099-G forms for unemployment income, or state or local tax refunds
- SSA-1099 for Social Security benefits received
- 1099-R, Form 8606 for payments/distributions from IRAs or retirement plans
- 1099-INT, -DIV, -B, or K-1s for investment or interest income
- Miscellaneous income: jury duty, gambling winnings, Medical Savings Account, scholarships, etc
- 1099-C forms for cancellation of debt

## Adjustments to your income

These following items can help reduce the amount of your income that is taxed, which can increase your tax refund, or lower the amount you owe.

- Form 1098-E for student loan interest paid (or loan statements for student loans)
- Form 1098-T for tuition paid (or receipts/canceled checks for tuition paid for post-high school)
- For teachers: Canceled checks or receipts for expenses paid for classroom supplies, etc.
- Records of IRA contributions made during the year
- Receipts for any qualifying energy-efficient home improvements (solar, windows, etc.)
- Records of Medical Savings Account (MSA) contributions
- Self-employed health insurance payment records
- Keogh, SEP, SIMPLE, and other self-employed pension plans

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## Turn the Sheet Over

### Deductions and credits

The government offers a number of deductions and credits to help lower the tax burden on individuals, which means more money in your pocket. You'll need the following documentation to make sure you get all the deductions and credits you deserve:

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- Child care costs: provider's name, address, tax ID, and amount paid
- Education costs: Form 1098-T, education expenses
- Forms 1098: Mortgage interest, private mortgage insurance (PMI), and points you paid
- Investment interest expenses
- Charitable donations: cash amounts, official charity receipts, canceled checks; value of donated

### Taxes you've paid

- State and local income taxes paid
- Real estate taxes paid
- Personal property taxes
- Vehicle license fees based on value of vehicle