Personal Taxes Checklist

The following checklist will help you collect the documents needed to file your tax return.

◻ **Social Security numbers and dates of birth** for taxpayers, spouses, and dependents

◻ **Copy of Driver's License** for taxpayer and spouse

◻ **W-2 Forms** for all jobs. If they are not sent in the mail, make sure you have the electronic copy for us

◻ **1099 Forms** for interest, dividends, sales, retirement, Social Security, self-employment (1099-NEC), unemployment, etc. Remember to download and print statements from online accounts that don't send paper tax forms.

◻ **Property Tax Statements or what you paid last year**

◻ **Forms 1098 for Mortgage Interest**

◻ **Foreign Accounts.** Bring statements. Such assets must be disclosed even if they do not generate income.

◻ **Purchase and Sale information,** including dates, relating to anything sold or purchased

◻ **Stock Options- Forms 1099-B** and supplemental statements showing income reported on W-2

◻ **Cryptocurrency.** Bring details including dates, proceeds, and original cost

◻ **Forms W-2G** for gambling winnings. Bring a log of gambling sessions (if available)

◻ **Child Care Provider Information** (Name, address, tax ID#, amount paid to them for each child) *Required even if you have a daycare flex account for work*

◻ **Bankruptcy or Divorce papers** (if applicable)

◻ **Records showing income/expenses for rental property you own or business property you rent** (records of business and personal mileage are required for automobile mileage deductions)

◻ **Form K-1** If you have an interest in a Partnership, S-Corporation, Estate of Trust

◻ **IRA** (traditional, Roth, SEP, Simple) year end statements and forms 5498

◻ **Bring details for <u>all</u> other income** whether you think its taxable or not. Examples may include, foreign income, barter, hobby, settlements, awards/prizes, etc.

◻ **Forms 1098-T** for post-secondary tuition payments. These are usually sent to the student through their student account, so please have your dependent provide them if claiming them on your tax return

◻ **Forms 1099-Q** for education savings plan distributions

◻ **Form 1098-E for Student loan interest**

◻ **Estimated taxes paid** (Amounts and dates paid)

◻ **Adoption Costs** if applicable. Also bring legal adoption documents.

◻ **Charitable donations** Bring separate totals for cash and then non-cash contributions. For noncash donations over $500 include date, place, fair market value, and original cost.

◻ **Form 1098-C** for donations of automobile or boats

◻ **If you purchased a new electric plug-in vehicle,** bring the year, the make, VIN and purchase date

◻ **If you installed solar or geothermal systems,** bring receipts

◻ **Other energy efficient home improvements** (e.g furnace, AC, windows, doors, insulation, metal roof, etc) Bring Receipts

◻ **If debts were forgiven, bring form 1099-C or 1099-A**

◻ **If you bought, sold, refinanced a home bring the closing papers**

◻ **Form 1099-K for internet or credit card sales**

◻ **HSA (Health Saving Accounts) form 1099-SA, 5498-SA**

◻ **Form 1095-A for marketplace healthcare plans purchased through healthcare.gov**

◻ **Out of pocket medical expenses (if large amount) may be deducible if over 7.5% of adjusted gross income**

◻ **Form 1099-LTC** for long term care policy benefits paid

◻ **Bring bank account info for direct deposit of any expected refunds**

◻ **Last year's tax return (*For New Clients Only)***

◻ **Noncustodial parents claiming children- Need a signed** 8332 Form