

# Tax Preparation

## Checklist

### Personal Information

- Social Security numbers and birthdates (you, spouse, dependents)
- Last year's tax return
- Bank account and routing numbers (for refunds or payments)

### Income Documentation

- Wages and Tips: W-2 forms
- Self-Employment: 1099-NEC, 1099-K (third-party payments like PayPal)
- Other Income: K-1 forms (S corps, partnerships, trusts, estates)
- Retirement Distributions: 1099-R forms
- Real Estate Sales: 1099-S forms and property purchase details
- Investment Income: 1099-INT, 1099-DIV, 1099-B, 1099-MISC forms
- Social Security Benefits: SSA-1099 forms
- Alimony Received: (for pre-2019 agreements)
- Rental Income: profit/loss statements, depreciation schedules
- Additional Income: stock options, gambling winnings/losses, jury duty payments, awards, taxable scholarships, HSA/MSA/ESA distributions (non-qualified uses)

### Tax Credits

- Childcare Expenses: provider name, address, taxpayer ID
- Education Expenses: 1098-T forms
- Adoption Costs: legal, medical, transportation records
- Electric Vehicle Purchase: proof of purchase
- Energy-Efficient Home Upgrades: solar, wind, battery storage documentation
- Health Insurance (ACA): Form 1095-A

## Deductions, Adjustments, and Credits

- Alimony Payments: (pre-2019 agreements)
- Student Loan Interest: Form 1098-E
- Retirement Contributions: IRA, HSA/MSA contributions, Form 5498
- Self-Employed Health Insurance: payment records
- Medical and Dental Expenses: receipts, insurance premiums, medical travel costs
- Mortgage Interest: Form 1098, refinancing documents
- Charitable Donations: receipts, mileage logs
- Vehicle Taxes: based on vehicle value
- State and Local Taxes: property, sales, and income tax payments

## Additional Information

- Estimated Tax Payments: dates and amounts
- Prior-Year Refunds: applied to current year
- Foreign Accounts: location, bank name, account number, peak value

**GET YOUR DOCUMENTS ORGANIZED FOR**  
*Tax season success!*