



Get organized for your tax preparation appointment with this checklist.

YOU SPOUSE DEPENDENTS

Basic Info

- | | | | |
|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Name, SSN or ITIN, and date of birth |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Last Year's Return - hard copy or PDF file |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Current Tax Year's estimated taxes paid |

Documents Received

- | | | | |
|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Form W-2s - wage and tax statements |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Form 1098s - includes mortgage interest (1098) and student loan interest (1098-E) |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Form 1099s - includes dividend income (1099-DIV), interest income (1099-INT & 1099-OID), merchant card and third party network payments (1099-K), miscellaneous income (1099-MISC), retirement plan distribution (1099-R), sale of home or real estate (1099-S) and unemployment compensation (1099-G) |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Form 2439s - notice to shareholder of undistributed long-term capital gains |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Schedule K-1s - partnership, S Corporation and trust income |

Personal Records

- | | | | |
|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Child and Dependent Care Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Education Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Medical Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Vehicle (Personal Property) Taxes Paid |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Real Estate Taxes |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Mortgage Interest Paid |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Charitable Contributions |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Business or Employee Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Gambling Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Investment Transactions |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Retirement Contributions |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Foreign Earned Income and Foreign Taxes Paid |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Moving Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Energy Efficiency Property Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Household Employee Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Alimony Expenses and/or Income |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Expenses for miscellaneous itemized deductions |

E-file/Print

- | | | | |
|--------------------------|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Bank Information (Account and Routing Number for Direct Deposit/Withdrawal) |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Prior year's Self-Select PIN or Prior year's AGI (Adjusted Gross Income) |