

Tax Preparation Checklist

ALL TAX FILERS

- | | |
|--|---|
| <input type="checkbox"/> SSN and DOB (yourself & dependents) | <input type="checkbox"/> 1099 forms for other income/benefits |
| <input type="checkbox"/> Bank account & routing number | <input type="checkbox"/> Charitable contributions |
| <input type="checkbox"/> Copy of last year's return | <input type="checkbox"/> Medical/Dental expenses |
| <input type="checkbox"/> W2's from all employers | <input type="checkbox"/> Health insurance premiums |

RESIDENTIAL PROPERTY OWNERS

- | | |
|---|---|
| <input type="checkbox"/> 1098 form (mortgage interest) | <input type="checkbox"/> Closing documents if you bought/sold during the year |
| <input type="checkbox"/> Receipt from energy efficient upgrades | |
| <input type="checkbox"/> Insurance premiums | |
| <input type="checkbox"/> Real estate taxes paid | |



RENTAL PROPERTY OWNERS

- | | |
|---|---|
| <input type="checkbox"/> Rental income | <input type="checkbox"/> Mileage for inspection & repairs |
| <input type="checkbox"/> Receipt for all expenses | <input type="checkbox"/> Mortgage interest |
| <input type="checkbox"/> Insurance premiums | |
| <input type="checkbox"/> Real estate taxes paid | |



BUSINESS OWNERS

- | | |
|---|---|
| <input type="checkbox"/> Tax ID | <input type="checkbox"/> Business use of home (if applicable) |
| <input type="checkbox"/> Business income & expenses | <input type="checkbox"/> 12/31 bank balance |
| <input type="checkbox"/> List of capital assets & equipment | <input type="checkbox"/> Mileage log |
| <input type="checkbox"/> Quarterly taxes paid | |



OTHER

- | | |
|--|--|
| <input type="checkbox"/> Retirement plan contributions | <input type="checkbox"/> Job search & moving expense |
| <input type="checkbox"/> CHILD CARE LETTER WITH EIN | <input type="checkbox"/> 1098-T Educational expenses |
| <input type="checkbox"/> Sales tax from vehicle purchase | <input type="checkbox"/> FEMA assistance |