

Detailed Tax Return Preparation Checklist

Please have available the items that apply to your tax situation.

- Social Security Card(s)
- Driver's License(s)
- Dependents' Social Security Numbers & Dates of Birth
- Last Year's Federal and State Tax Returns
- Wage Statements - Form W-2
- Pension or Retirement Income - Form 1099-R
- Interest and Dividend Income - Form 1099-INT/Form 1099-DIV
- State Income Tax Refund Amount - Form 1099-G
- Social Security Income - Form SSA-1099
- Unemployment Income - Form 1099-G
- Commissions Received/Paid
- Information on sales of Stocks or Bonds - Form 1099-B
- Self-Employed Business/Farm Income & Expenses - Form 1099-MISC
- Lottery or Gambling Winnings - Form W-2G
- Lottery or Gambling Losses
- Income and Expenses From Rentals
- Income from Partnerships, S Corporations, Trusts, and Estates - Schedule K-1
- IRA Contributions
- Alimony Paid or Received
- Child Care Expenses & Provider Information
- Medical, Eye Care, and Dental Expenses
- Cash and Non-cash Charitable Donations
- Record of Purchase or Sale of Residence
- Settlement statement or HUD-1 if purchased a home
- Mortgage or Home Equity Loan Interest Paid - Form 1098
- Real Estate and Personal Property Taxes Paid
- State or Local Sales Taxes Paid
- Un-reimbursed Employment-Related Expenses
- Job-Related Educational Expenses
- Educator Expenses
- Tuition and Education Fees - Form 1098-T
- Student Loan Interest - Form 1098-E
- Casualty or Theft Losses
- Estimated Taxes
- Foreign Taxes Paid