

Tax to do checklist of documents to bring to a tax preparation appointment

Please print this tax to-do checklist, look it over, and check off those items you have for your tax return. Please bring all tax documents when you came to see us.

General Information

- Copy of Last Year's Tax Return
- Social Security Numbers for You and Your Spouse
- Educational Expenses for You and Your Spouse
- Dependents' Names, Years of Birth, and Social Security Numbers
- Dependents' Post High School Educational Expenses
- Child Care Expenses for Each Dependent
- Prior Year Adjusted Gross Income (AGI) & Personal Identification Number (PIN)
- Routing Transmit Number (RTN) (For direct deposit/debit purposes)
- Bank Account Number (BAN) (For direct deposit/debit purposes)

General Taxable Income

- W-2 Form(s) for Wages, Salaries, and Tips
- Interest Income Statements: Form 1099-INT & 1099-OID
- Dividend Income Statements: Form 1099-DIV
- Sales of Stock, Land, etc. for Capital Gains: Form 1099-B
- Sales of Real Estate: Form 1099-S
- State Tax Refunds: Form 1099-G
- Alimony Received or Paid
- Unemployment Compensation Received
- Miscellaneous Income: Form 1099-MISC

Retirement Income

- Retirement Income: Form 1099-R
- Social Security Income and Railroad Retirement Income: Form SSA-1099

Business Income

- Business Income and Expenses
- Rental Income and Expenses
- Farm Income and Expenses
- Form K-1 Income from Partnerships, Trusts, and S-Corporations
- Tax Deductible Miles Traveled for Business Purposes

Tax Credits

- Child Care Provider Address, I.D. Number and Amounts Paid
- Adoption Expense Information
- Foreign Taxes paid
- First Time Home Buyer Tax Credit

Expenses and Tax Deductions

- Medical Expenses for the Family
- Form 1095-A – Health Insurance Marketplace Statement
- Proof of Other Health Insurance Coverage
- Health Insurance Exempt Certificate-If you don't have insurance coverage
- Medical Insurance Paid
- Prescription Medicines and Drugs
- Doctor and Dentist Payments
- Hospital and Nurse Payments
- Tax Deductible Miles Traveled for Medical Purposes
- Home Mortgage Interest from Form 1098
- Home Second Mortgage Interest Paid
- Real Estate Taxes Paid
- State Taxes Paid with Last Year's Return (if claiming itemized deductions)
- Personal Property Taxes Paid
- Charitable Cash Contributions
- Fair Market Value of Non-cash Contributions to Charities
- Unreimbursed Expenses Related to Volunteer Work
- Tax Deductible Mileage for Volunteer Purposes
- Casualty and Theft Losses
- Amount Paid to Professional Preparer Last Year
- Unreimbursed Expenses Related to Your Job
- Miles Traveled Related to Your Job
- Union and Professional Dues
- Investment Expenses
- Job-hunting Expenses
- IRA Contributions
- Student Loan Interest Paid
- Moving Expenses
- Last Year's Tax Preparation Fee

Tax Estimate Payments

- Estimated Tax Payments Made with ES Vouchers
- Last Year's Tax Return Overpayment Applied to This Year
- Off Highway Fuel Taxes Paid