

Tax Prep Checklist

Personal Information:

- SSN or ITIN, full names and birth dates for everyone included on your return.
- Amount of alimony paid and ex-spouse SSN, if divorced before 1/1/19.
- Childcare records (including provider's ID number)
- If new client, copies of last 2 years tax returns

Income, Investments, Retirement:

- All forms that say W-2, 1098, 1099, or Schedule K-1
- Tax documents for investment accounts
- Closing statements for any real estate purchased or sold
- Records of any contributions you made to IRA's, other retirement plans, and education savings accounts (529 Plans)
- Records of other income or expenses (jury duty, gambling, hobby, alimony, etc.)
- Records of business income and expenses if you are an independent contractor, self-employed, or own rental real estate
- Tax documents for any retirement disbursements, rollovers, or conversions.

Education:

- Education scholarships or fellowships
- Records of tuition and other higher education expenses (Form 1098-T)
- Student loan interest paid (Form 1098-E)
- Record of withdrawal from a 529 Plan (Form 1099-Q)

Itemized Deductions:

- Mortgage interest (Form 1098), real estate and personal property tax paid
- Prior year's amount of state/local income tax paid
- Records of cash amounts donated to houses of worship, schools, and other charitable organizations
- Records of miles driven for charitable purposes

Healthcare:

- Form 1095-B or Form 1095-C if you have insurance through a government plan, private plan, or employer plan
- Form 1095-A if you are enrolled in an insurance plan through the Marketplace (Exchange)
- Marketplace Exemption certificate if you applied for and received an exemption from the Marketplace (Exchange)
- HSA information (Forms 5498, 1099-SA)
- Statements or receipts for medical expenses (including miles driven for medical purposes)

Estimated Tax Payments:

- List of all federal, state and local estimate tax payments and dates paid.

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