

PERSONAL TAX PREP CHECKLIST

Here's a summary of what you'll need to bring with you to have your taxes prepared.

Personal Information

- Your social security number
- Your spouse's full name and social security number
- Amount of any alimony paid and ex-spouse's full name and social security number
- If you want your refunds direct deposited – your bank's routing number and your bank account number

Information about Other People Who May Belong on Your Return

- Dates of birth and social security numbers
- Childcare/Daycare expenses (including the provider's tax ID number & address) if applicable
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

Education Payments

- Forms 1098-T from educational institutions
- Receipts that itemize qualified educational expenses (books & supplies need specifically for a course of study) (NOT DEDUCTIBLE – Room & Board, Transportation, Insurance, Living Expenses)
- Records of any scholarships or fellowships you or your qualifying dependent received
- Form 1098-E if you paid student loan interest

Wage Information

- W-2 Forms

Self-Employment Information

- Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s
- Records of all expenses — check registers or credit card statements, and receipts
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Office in home information, if applicable (Exact square footage of office & home, total of each utility bill paid for the year)

Business Use of Vehicle Information

- Log showing total miles driven for the year (or beginning/ending odometer readings), total business miles driven for the year (other than commuting), and the business purpose of the mileage
- Amount of parking and tolls paid
- If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc. ***You can only claim mileage OR actual expenses not both***

Rental Property Income

- Records of income and expenses
- Rental asset information (cost, date placed in service, etc.) for depreciation

Retirement Income

- Pension/IRA/annuity income (1099-R)
- Social security/RRB income (1099-SSA, RRB-1099)

Savings and Investments

- Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-S)
- Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)

Other Income

- Unemployment, state tax refund (1099-G)
- Gambling income (W-2G or records showing income, as well as expense records)
- Amount of any alimony received
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Other 1099 Forms

Real Estate & Personal Property Deductions

- Forms 1098 or other mortgage interest statements
- Real estate and personal property tax records

Affordable Care Act (Obamacare) Requirements

- Form 1095 – A, B, or C (if applicable – if you purchased your insurance thru the Marketplace you will receive this form. If you did not purchase thru the marketplace you may or may not receive this form)
- Insurance ID Card for proof of insurance coverage
- If you did not receive forms 1095 – A, B, or C we will need to know how much you paid per month for coverage (if you were not covered for the full year) or the annual cost of your insurance premium for 2014.

Other Deductions and Credits

- Receipts for classroom expenses (for educators in grades K-12)
- Form 5498-SA showing HSA contributions
- Record of moving expenses not reimbursed by employer
- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Invoice showing amount of vehicle sales tax paid
- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- Amounts of miles driven for charitable or medical purposes
- Expenses related to your investments
- Amount paid for preparation of last year's tax return
- Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
- Job-hunting expenses
- Receipts for energy-saving home improvements
- Record of estimated tax payments made

IRA Information

- Form 5498 showing IRA contributions
- Traditional IRA basis