



Taxes Checklist

✓ Personal

- Your Social Security Number or Tax ID Number and unexpired government issued ID
- Your spouse's full name and Social Security number or tax ID number, unexpired government issued ID, and birthdate
- Routing and account numbers to receive your refund or pay your balance if desired
- Foreign Reporting or Residency Information- if applicable
- Identity Protection PIN if one has been issued to you, your spouse, or dependents by the IRS

✓ Income

Employed

- W-2 Forms

Unemployed

- Unemployment Form 1099-G

Self-Employed

- Forms 1099-NEC and 1099-K
- 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
- Home office information, if applicable
- Record of estimated tax payments made (Form 1040ES)

Rental Income

- Records of income and expenses
- Rental asset information (cost, date placed in service, etc.) for depreciation
- Record of estimated tax payments made (Form 1040ES)

✓ Dependents

- Dates of birth and Social Security numbers or other tax ID numbers
- Childcare records (including the provider's tax ID number) if applicable
- Form 8332 when the child's custodial parent is releasing their right to claim a child to the noncustodial parent (if applicable)
- Income of children or dependent(s) in your household

Retirement Income

- Pension/IRA/annuity income (1099-R)
- Traditional IRA basis (prior-year Forms 8606 showing amounts already taxed)
- Social Security/RRB income (SSA-1099, RRB-1099)

Savings & Investments or Dividends

- 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)
- Expenses related to your investments
- Record of estimated tax payments made (Form 1040ES)
- 1099-B and/or 1099-DIV from cryptocurrencies, NFTs and all other similar type income or loss
- Cost of all cryptocurrencies, NFTs and other similar type of income sales

✓ Income Continued



Other Income or Losses

- State refunds (Form 1099-G)
- Income from K-1s either as investment or as active owner
- Gambling income (W-2G or records showing income, as well as expense records)
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Trusts
- Royalties (1099-MISC)
- Any other 1099s received
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC) Deductions

Home Ownership

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

Charitable Donations

- Cash amounts donated to religious organizations, schools, other charitable organizations
- Records of non-cash charitable donations
- Amounts of miles driven for charitable purposes

Childcare Expenses

- Daycare paid for a child under age 13 so the taxpayer (and spouse) can work
- Wages paid to a babysitter

Medical Expenses

- Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- Miles driven for medical purposes
- Travel expenses for medical, including hotels, planes, tolls, parking, etc

Health Insurance

- Form 1095-A if you have health insurance through a State Marketplace (Exchange)

Educational Expenses

- Forms 1098-T from educational institutions
- Receipts for qualified educational expenses
- Records of scholarships or fellowships
- Form 1098-E for student loan interest

State & Local Taxes or Sales Tax

- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Invoice for large item purchases such as cars, boats, motorcycles etc.
- Amount of real estate taxes paid
- Amount of personal property taxes paid

Retirement & Other Savings

- Form 5498-SA showing HSA contributions
- Form 5498 showing IRA contributions
- All other 5498 series forms (5498-QA, 5498-ESA)

Federally Declared Disaster

- City/county you lived/worked/had property in
- Records to support property losses (appraisal, clean-up costs, etc.)
- Records of rebuilding/repair costs
- Insurance reimbursements/claims to be paid
- FEMA assistance information