

TAX PREP CHECKLIST

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BASICS FOR ALL FILERS

- social security numbers (yourself & dependents)
- copy of last year's tax return
- bank account/routing number
- loan statements

INCOME

- W-2's
- 1099 for all forms of income

HOME & RENTAL PROPERTIES

- 1098s: interest on mortgage, equity or student loans
- paid real estate taxes
- insurance premiums
- energy efficient upgrade receipts
- purchase/sale records (home, rental property, etc.)
- rental income
- mileage (for business related use)
- receipts (repairs, upgrades, expenses, etc.)

BUSINESS OWNERS

- tax ID/EIN letter
- insurance premiums and/or expenses
- business income and expenses
- list of assets and equipment
- mileage logs

DONATIONS

- charitable donations receipts
- volunteer expense deductions

DEDUCTIONS

- medical/dental expenses
- health insurance payments
- IRA and HSA contributions
- vehicle purchase sales tax
- childcare expenses
- job search expenses
- moving expenses
- amount paid for last year's tax prep
- educational expenses (loan interest/supplies/tuition)

OTHER MISC.

- record of estimated tax payments
- IRA/401K total contributions

**This is NOT an all-inclusive list. If you have questions, please reach out to your tax professional.