



TAX PREPARATION CHECKLIST (All items may not apply to your return)

Personal Information

- Date of Birth and Social Security Number
- Your Spouse's Full Name and Social Security Number
- Amount of any alimony paid and ex-spouse's Social Security Number

Other people who may belong on your return

- Dates of Birth and Social Security numbers
- Childcare records (including the provider's ID number)
- Approximate income of other adults in your home (not spouse if you're fil
- Form 8332, copies of your divorce decree, or other documents showing that your ex-spouse is releasing their right to claim a child to you

Education Payments

- Bill from the educational institution or anything else that itemizes what you paid or received loans for versus what was covered by scholarship
- Form 1098-T and 1098-E, if you received tl

Employee Information

- Form W-2

Self-Employment Information

- Forms 1099-MISC, Schedule K-1, income records to verify amounts not reported on 1099s
- Records of all expenses-check registers or credit card statements, and rec
- Business-use asset information (cost, date placed in service, etc.) for depr
- Office in home information, if applicable

Vehicle Information

- Type of vehicle
- Total miles driven for the year (or beginning/ending odometer reading)
- Total business miles driven for the year (other than commuting)
- 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 expenses, etc..



Rental 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)

Saving and Investments

- Interest, dividend income (1099-INT, 1099)
- Income from sales of stock or other property (1099-B, 1099-S)
- Date of acquisition and records of your cost/basis in property you sold

Employee Information

- Unemployment, state tax refund (1099-G)
- Gambling income (W-2G or records showing income/gambling expenses)
- Amount of any alimony received and ex-spouse's name
- Health care reimbursements (1099-SA or 1099-LTC)
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Other 1099

Itemizing Deductions

- Forms 1098 or other mortgage statements
- Amount of state/Local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Real estate and personal property tax paid
- Cash amounts donated to house of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Amounts paid for healthcare insurance and to doctors, dentist, hospitals
- Amounts of miles driven for charitable or medical purpose
- Expenses related to your investments
- Amount paid for preparation of your 2015 tax return
- Employment-related expenses (dues, publications, tools. Uniform cost and cleaning. Travel)

IRA Information

- Amount contributed for 2014 (and 2015 if applicable)
- Traditional IRA basis
- Value of IRA on Dec. 31, 2014

