

Tax Return Preparation Checklist

General Taxable Income

- W-2 Form(s) for Wages, Salaries
- Interest Income Statements:
Form 1099-INT & 1099-OID
- Dividend Income : Form 1099-DIV
- Sale of Stock, Land, etc: Form 1099B
- Alimony Received or Paid
- Unemployment
Compensation Received
- Misc Income: Form 1099-MISC

Retirement Income

- Retirement Income: Form 1099-R
- Social Security Income : Form SSA-1099

Business Income

- Business Income and Expenses
- Rental Income and Expenses
- Farm Income and Expenses
- Form K-1 Income from Partnerships,
Trusts, and S-Corporations
- Business Miles and Personal Miles

Tax Credits

- Child Care Provider Address, I.D.
Number and Amounts Paid
- Adoption Expense Information
- Foreign Taxes paid

Expenses and Tax Deductions

- Medical Expenses for the Family
- Tax Deductible Miles Traveled for
Medical Purposes
- Mortgage Interest from Form 1098
- Real Estate Taxes Paid
- Charitable Cash Contributions
- Fair Market Value of Non-cash
Contributions to Charities
- Tax Deductible Mileage for Volunteer
Purposes
- Unreimbursed Expenses Related to
Your Job
- Investment Expenses
- Job-hunting Expenses
- IRA Contributions
- Student Loan Interest Paid
- Moving Expenses
- Last Year's Tax Preparation Fee

Other Information

- Copy of Last Year's Tax Return
- Social Security Numbers for You and
Your Spouse
- Educational Expenses for You and
Your Spouse
- Dependents' Names, Years of Birth,
and Social Security Numbers
- Dependents' Post High School
Educational Expenses
- Voided check (For direct deposit/debit
purposes)
- Estimated Tax Payments Made