

# Checklist of Documents and Information Needed to Prepare Your Tax Return

The following list covers a large portion of your tax experience, but not limited to all of the documents needed for successful tax prep. If you are unsure about an item, bring it with you.

- Social Security Numbers (SSNs) for yourself, spouse and all dependents
- Identification such government issued ID, state drivers license or ID, or passport
- Copy of prior year's federal and state return **(if you are a new client)- NEW CLIENT QUESTIONAIRE**
- All W-2s
- Records of other income, such as self-employment income, tip income, rental income, alimony, gambling winnings, or unemployment compensation
- Social security Statements
- All 1099 documents
  
- Medical and dental expenses
- Medical miles
- Medical/ Dental insurance
- Amount of long-term care insurance paid (if applicable)
- Form 1098 (mortgage interest statements)
- Charitable donations
- Charitable miles driven
- Amount of personal property tax/ real estate taxes paid
  
- Name, address, SSN/EIN and amount paid to day care provider (if applicable)
  
- Rental income and rental property expenses (if applicable)
- Sales price and cost basis for any stocks or mutual funds sold (if applicable)
  
- Amounts invested in college savings accounts (if applicable)
- All information if you purchased or sold a home in the year.

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## **Business Tax Returns**

- If you have inventory- The end of year inventory/ beginning of year inventory.
- Total receipts
- Taxes paid, or estimated taxes paid
- Expenses with receipts, bookkeeping documents, or bank records
- All income to include 1099's, and invoices