

## Use the tax checklist below to find the documents and forms you'll need to get started

### Personal Information

- Your social security number or tax ID number
- Your spouse's full name and social security number or tax ID number

### Dependent(S) Information

- Dates of birth and social security numbers or tax ID numbers
- Childcare records (including the provider's tax ID number) if applicable
- Income of other adults in your home
- Form 8332** showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent ( if applicable)

### Sources Of Income

#### Employed

- Forms W-2**

#### Unemployed

- Unemployment , state tax refund (**1099-G**)

#### Self -Employed

- Forms **1099-MISC, Schedules K-1**, 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
- Office in home information, if applicable
- Records 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**)

#### Retirement Income

- Pension /IRA/annuity income (**1099-R**)
- Traditional IRA basis (i.e amounts you contributed to the IRA that were already taxed)
- Social security /RRB income (**1099-SSA, 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 you cost or other basis in property you sold (if basis is not reported on **1099-B**)

Health Savings Account and long term reimbursements ( **1099-SA or 1099-LTC**)

Expenses related to your investments

Record of estimated tax payments made ( **Form 1040ES**)

#### Other Income & Losses

Gambling income ( **W-2G** or records showing income, as well as expense records )

jury duty records

Hobby income and expenses

Prizes and awards

Trusts

Royalty Income **1099 Misc**

Any other **1099s** received

Record of alimony paid/ received with Ex -spouse's name and SSN

#### Types of Deductions

##### Home Ownership

**Forms 1098** or other mortgage interest statements

Real estate and personal property tax records

Receipts for energy - saving home improvements

All other **1098** series forms

##### Charitable Donations

Cash amounts donated to houses of worship , schools , other charitable organizations

Records of non -cash charitable donations

Amounts of miles driven for charitable or medicals purposes

##### Medical Expenses

Amounts paid for healthcare insurance and to doctors, dentists, hospitals

##### Health Insurance

**Form 1095-A** if you enrolled in an insurance plan through the Marketplace ( Exchange)

**Form 1095-B** and /or **1095-C** if you had insurance coverage through any other source ( i.e. an employer , insurance company , government health plan such as **Medicare, Medicaid, CHIP,TRICARE,VA**, etc)

Marketplace exemption certificate (**ECN**) if you applied for and received an exemption from the Marketplace (Exchange)

##### Childcare Expenses

Fees paid to licensed day care center or family day care for care of an infant or preschooler  
 Wages paid to a baby -sitter. Don't include expenses paid through a flexible spending account at work.

#### Educational Expenses

**Forms 1098-T** from educational institutions  
 Receipts that itemize qualified educational expenses  
 Records of any scholarships or fellowships you received  
 Form **1098-E** if you paid student loan interest

#### Job Expenses & Tax Prep Fees

Employment related vehicle expenses (tolls, mileage, gas, maintenance, license, property tax, interest expense, parking)  
 Receipts for classroom expenses (for educators in grades **K-12**)  
 Employment - related expenses ( dues , publications, tools, uniform cost and cleaning , travel)  
 job- hunting expenses  
 Record of moving expenses not reimbursed by employer  
 Amount paid for preparation of last year's tax return

#### 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 showing amount of vehicle sales tax 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 /country you lived /worked /had property in  
 Records to support property losses (appraisal, cleanup costs, etc)  
 Records of rebuilding / repair costs  
 Insurance reimbursements/ claims to be paid  
 **FEMA** assistance information  
 Check FEMA site to see if my country has been declared a federal disaster area.