

Tax Preparation Checklist

General Information

- Photo ID
- Social Security Card or ITIN for everyone listed on tax return
- Previous Year Tax Return

Income Forms

- Wages and salaries (Form W-2)
- IRA and pension distributions (Form 1099-R)
- Interest income (Form 1099-INT)
- Dividend income (Form 1099-DIV)
- Unemployment compensation (Form 1099-G)
- Social security benefits (Form SSA-1099)
- Railroad Retirement Benefits (Form RRB-1099-R)
- Taxable state or local refunds (Form 1099-G)
- Capital gain distributions (Form 1099-DIV)
- Sales of stocks and mutual funds (Form 1099-B)
- Self-employment income (Form 1099-NEC, Form 1099-MISC)
- Cancellation of debt income (Form 1099-C or Form 1099-A)
- Tuition program distributions (Form 1099-Q)
- Gambling Winnings (Form W-2G)
- Alimony received

Education

- Education expenses (Form 1098-T)
- Expense for books and required materials
- Teacher (educator) expenses
- Student loan interest (Form 1098-E)

Home and Health

- Home mortgage interest, points, and insurance (Form 1098)
- Medical expenses paid out of pocket
- Health savings account contribution (HAS) (Form 8889)
- Distribution from HSA, Archer MSA, or Medicare Advantage MSA (Form 1099-SA)

Other Forms

- Donations to Charities
- Gambling Losses
- Jury Duty Repayments