



Tax Preparation Checklist: Things to Bring When Visiting a Tax Professional

Personal Data

- Social Security Numbers (including spouse and children)
- Child care provider tax I.D. or Social Security Number

Employment & Income Data

- W-2 forms for this year
- Tax refunds and unemployment compensation:
Form 1099-G
- Miscellaneous income including rent:
Form 1099-MISC
- Partnership and trust income
- Pensions and annuities
- Alimony received
- Jury duty pay
- Gambling and lottery winnings
- Prizes and awards
- Scholarships and fellowships
- State and local income tax refunds

Homeowner/Renter Data

- Residential address(es) for this year
- Mortgage interest: Form 1098
- Sale of your home or other real estate: Form 1099-S
- Second mortgage interest paid
- Real estate taxes paid
- Rent paid during tax year
- Moving expenses

Financial Assets

- Interest income statements: Form 1099-INT & 1099-OID
- Dividend income statements: Form 1099-DIV
- Proceeds from broker transactions: Form 1099-B
- Retirement plan distribution: Form 1099-R

Financial Liabilities

- Auto loans and leases (account numbers and car value)
if vehicle used for business
- Student loan interest paid
- Early withdrawal penalties on
CDs and other time deposits

Automobiles

- Personal property tax information

Expenses

- Gifts to charity (receipts for any single
donations of \$250 or more)
- Unreimbursed expenses related to volunteer work
- Unreimbursed expenses related to your job
(travel expenses, entertainment, uniforms,
union dues, subscriptions)
- Investment expenses
- Job-hunting expenses
- Education expenses
- Child care expenses
- Medical Savings Accounts
- Adoption expenses
- Alimony paid
- Tax return preparation expenses and fees

Self-Employment Data

- K-1s on all partnerships
- Receipts or documentation for
business-related expenses
- Farm income

Deduction Documents

- State and local income tax: your estimated tax
vouchers for the current tax year
- IRA, Keogh and other retirement plan contributions
- Medical expenses
- Casualty or theft losses
- Other miscellaneous deductions

Other Items

Notes:

