


Tax Prep Checklist

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Personal info

A Social Security or tax ID number for everyone included on your tax return

Date of birth for everyone on your return

Income and investments

Form W-2, Wage and Tax Statement

Bank or financial institution statements

Last year's state refund amount 

Other miscellaneous income records

Any Form 1099s

Information about stocks that you traded or sold (Forms 8945 and 8949)

Homeownership info


Property tax receipts

Self-employment and business records

Business expense records

Quarterly estimated tax payment receipts

Mileage records

Home office expenses 


Medical expense records

Receipts for unreimbursed medical expenses

Health insurance coverage forms (Form 1095s)

Social Security benefits

Education

Tuition and qualified expenses paid (Form 1098-T) 

Student loan interest paid (Form 1098-E)