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
- [ ] Last year's federal and state tax returns

Dependents

- [ ] Childcare expenses and provider details
- [ ] Dependent care and custody information

Medical expense records

- [ ] Receipts for unreimbursed medical expenses
- [ ] Health insurance Marketplace statement (Form 1095-A)
- [ ] Health savings account (HSA) contributions and distributions (Forms 1099-SA and 5498-SA)

Homeownership info

- [ ] Property tax receipts
- [ ] Mortgage interest paid (Form 1098 Mortgage Interest Statement)

Charitable Donations

- [ ] Records of charitable donations, including cash and non-cash contributions

Education

- [ ] Tuition and qualified expenses paid (Form 1098-T)
- [ ] Student loan interest paid (Form 1098-E)

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
- [ ] Unemployment compensation (Form 1099-G) and Social Security benefits (Form SSA-1099)
- [ ] Records of qualified tips and overtime pay
- [ ] Cryptocurrency and other digital asset transaction records (Form 1099-DA)
- [ ] Records of stocks and other investments sold (Forms 1099-B and 8949)
- [ ] Forms 1099-DIV and 1099-INT

Retirement

- [ ] Retirement plan contributions and distributions
  - Form 5498: IRA Contributions Information
  - Forms 1099-R: Distributions From Pensions, Annuities, Retirement, etc.

Self-employment and business records

- [ ] Business expense records
- [ ] Quarterly estimated tax payment receipts
- [ ] Mileage records
- [ ] Home office expenses

Miscellaneous

- [ ] Records of property damage, losses, and insurance reimbursement due to federal or state disaster
- [ ] Gambling winnings (Form W-2G) and loss records