

Tax Preparation Checklist

Home & Rental Properties

- Rental Income
- Insurance Premiums
- Mileage & Receipts for Rental Repairs & Upgrades
- Paid Real Estate Taxes
- 1098s: Interest on Mortgage, Equity, or Student Loans
- Energy Efficient Upgrade Receipts

Business Owners

- Insurance Premiums & Expenses
- Mileage Logs
- Business Income & Expenses
- Tax ID
- List of Assets & Equipment

Other

Miscellaneous

- Estimated Tax Payments (self-employed)
- IRA/401K Total Contributions

Income

- W-2s
- 1099s for All Forms of Income

For All Filers

- Dates of Birth (yourself, spouse, & dependents)
- Social Security Numbers (yourself, spouse & dependents)
- Bank Accounts/Routing
- Loan Statements
- Copy of Last Year's Tax Return

Donations

- Charitable Contribution Receipts
- Volunteer Expense Deductions

Deductions

- Medical/Dental Expenses
- Childcare Expenses
- IRA and HSA Contributions
- Amount Paid for Last Year's Tax Prep
- Vehicle Purchase Sales Tax
- Educational Expenses (Loan Interest, Supplies, Tuition)
- Health Insurance Payments
- Moving Expenses
- Job Search Expenses