

# Tax Preparation Checklist

## What Do I Need to File My Taxes?

Every tax situation is different, so you may not need everything on this list. Use the sections that apply to you as you gather your tax documents.

### 1. Start Here: Basic Information

- ☐ Photo identification for you and your spouse, if filing jointly
- ☐ Social Security numbers or taxpayer identification numbers for you, your spouse and dependents
- ☐ Your prior-year tax return if Carolina Business Services did not prepare it
- ☐ Bank routing and account numbers if you want direct deposit or electronic payment
- ☐ Identity Protection PIN (IP PIN) if the IRS issued one to you
- ☐ Any letters or notices you've received from the IRS or a state tax agency

### 2. Income & Retirement

- ☐ W-2s from all employers
- ☐ 1099s for interest, dividends, contract work or other income
- ☐ Social Security benefit statement (SSA-1099)
- ☐ Pension, annuity or retirement account distribution statements (1099-R)
- ☐ Unemployment compensation statement (1099-G)
- ☐ Investment statements showing sales of stocks, bonds or other investments
- ☐ Records of rental income
- ☐ Records of any other income you received

### 3. Children, Dependents & Education

- ☐ Social Security numbers or taxpayer identification numbers for dependents, if not already provided
- ☐ Childcare expenses and the care provider's name, address and taxpayer identification number
- ☐ Form 1098-T for college tuition
- ☐ Form 1098-E for student loan interest
- ☐ Records of other qualified education expenses
- ☐ Records related to scholarships or education assistance
- ☐ Adoption-related records, if applicable

### 4. Home, Property & Investments

- ☐ Mortgage interest statement (Form 1098)
- ☐ Property tax records
- ☐ Records from the purchase or sale of a home or other property
- ☐ Records of major home improvements if you sold a home
- ☐ Investment statements showing sales of stocks, bonds, mutual funds or other investments
- ☐ Cryptocurrency or other digital asset transaction records
- ☐ Rental property income and expense records

## 5. Expenses, Contributions & Other Tax Records

- ☐ Charitable contribution records
- ☐ Medical and dental expense records
- ☐ Health insurance information, including Form 1095-A if you had Marketplace coverage
- ☐ Records of contributions to an IRA or other retirement account
- ☐ Health Savings Account (HSA) forms and contribution records
- ☐ Records of estimated federal or state tax payments
- ☐ Records related to other expenses or contributions you think may affect your taxes

## 6. Self-Employed or Own a Small Business?

- ☐ Records of business income, including 1099 forms received
- ☐ Business expense records and receipts
- ☐ Vehicle mileage and other vehicle expense records, if applicable
- ☐ Home office expense information, if applicable
- ☐ Records of equipment, tools, furniture or other major business purchases
- ☐ Business insurance and professional expense records
- ☐ Records of estimated federal and state tax payments
- ☐ Information about employees or independent contractors, if applicable

## 7. Did Something Change This Year?

- ☐ You married or divorced
- ☐ You had or adopted a child
- ☐ A dependent joined or left your household
- ☐ Your spouse or a dependent died
- ☐ You changed jobs, lost a job or retired
- ☐ You bought or sold a home or other property
- ☐ You started or closed a business
- ☐ You received an inheritance, large gift, legal settlement or cancellation of debt
- ☐ You had another significant financial or family change

**Not sure whether something applies to you?** Bring it with you. Carolina Business Services can review your documents with you and ask questions about anything else that may be needed to prepare your return.