

FFG Tax Checklist

Please provide for your Personal Tax Return:

Personal Information

- Social Security number, dates of birth for you, your spouse, and your dependents
- Copy of 2024 tax return & Bank account/routing number for deposit of a refund

Income Information for you/spouse

- W-2 forms
- 1099-MISC forms (for independent contractor work)
- SSA-1099 for Social Security benefits
- 1099-R, IRA distributions from IRAs
- 1099-S forms for income from sale of a property
- 1099-INT, -DIV, -B, or K-1s for investment or interest income
- Alimony received
- Rental property income and expenses: profit/loss statement, suspended loss information
- Miscellaneous income: jury duty, gambling winnings, Medical Savings Account, scholarships, etc.

Adjustments to your income

- Form 1098-E for student loan interest paid (or loan statements for student loans)
- Form 1098-T for tuition paid (receipts/canceled checks for tuition paid)
- Records of IRA contributions made during the year
- Receipts for any qualifying energy-efficient home improvements (solar, windows, etc.)
- Records of Medical Savings Account (MSA) contributions
- Self-employed health insurance payment records
- Records of moving expenses
- Alimony paid
- Keogh, SEP, SIMPLE, and other self-employed pension plans

Deductions and credits

- Childcare costs: provider's name, address, tax ID, and amount paid
- Education costs: Form 1098-T, education expenses
- Adoption costs: SSN of child; records of legal, medical and transportation costs
- Forms 1098: Mortgage interest, private mortgage insurance (PMI), and points you paid
- Investment interest expenses

FFG Tax Checklist

- Charitable donations: cash, charity receipts, value of property; miles driven and out-of-pocket expenses
- Medical and dental expense records
- Casualty and theft losses: amount of damage, insurance reimbursements
- Records/amounts of other miscellaneous tax deductions: union dues; unreimbursed employee expenses (uniforms, supplies, seminars, continuing education, publications, travel, etc.)
- Records of home business expenses, home size/office size, home expenses
- Rental property income/expenses: profit/loss statement, rental property suspended loss

Additional Info & Taxes you paid last year

- State and local income taxes paid
- Real estate & Personal Property taxes
- Vehicle license fees
- Estimated tax payments made during the year (self-employed)