

General Taxable Income

- Alimony Received or Paid
- Dividend Income Statements: Form 1099-DIV
- Interest Income Statements: Form 1099-INT & 1099-OID
- Miscellaneous Income: Form 1099-MISC
- Sales of Real Estate: Form 1099-S
- Sales of Stock, Land, etc.: Form 1099-B
- State Tax Refunds: Form 1099-G
- Unemployment Compensation Received
- W-2 Form(s) for Wages, Salaries, and Tips

Retirement Income

- Railroad Retirement & Social Security Income: Form SSA-1099
- Retirement Income: Form 1099-R

Tax Credits Checklist

- Adoption Expense Information
- Child Care Provider Address, I.D. Number and Amounts Paid
- First Time Home Buyer Tax Credit
- Foreign Taxes paid

Expense and Tax Deduction Checklist

- Amount Paid to Professional Preparer Last Year
- Casualty and Theft Losses
- Charitable Cash Contributions
- Doctor and Dentist Payments
- Fair Market Value of Non-cash Contributions to Charities
- Home Mortgage Interest from Form 1098
- Home Second Mortgage Interest Paid
- Hospital and Nurse Payments
- Investment Expenses
- IRA Contributions
- Job-hunting Expenses
- Last Year's Tax Preparation Fee
- Medical Expenses for the Family
- Medical Insurance Paid
- Miles Traveled for Volunteer Purposes
- Miles Traveled for Medical Purposes
- Miles Traveled Related to Your Job
- Moving Expenses
- Personal Property Taxes Paid
- Prescription Medicines and Drugs
- Real Estate Taxes Paid
- State Taxes Paid with Last Year's (if itemized)
- Student Loan Interest Paid
- Tax Deductible Unreimbursed Related to Your Job
- Union and Professional Dues
- Unreimbursed Expenses Related to Volunteer Work

Tax Estimate Payments Checklist

- Estimated Tax Payments Made with ES Vouchers
- Last Year's Tax Return Overpayment Applied to This Year
- Off Highway Fuel Taxes Paid

Expenses

- Educational Expenses for You and Your Spouse
- Prior Year Adjusted Gross Income (AGI) & Personal Identification
- Routing Transmit Number (RTN) (For direct deposit/debit)
- Social Security Numbers for You and Your Spouse

General Information

- Bank Account Number (BAN) (For deposit/debit purposes)
- Child Care Expenses for Each Dependent
- Copy of Last Year's Tax Return
- Dependents' Names, Years of Birth, Social Security Numbers
- Dependents' Post High School Educational

General Information

- Bank account number and routing number, if you are opting for depositing your tax refund directly into your bank account.
- Date of Birth for yourself, spouse and dependents.
- Full Names and Social Security Numbers for yourself, your spouse, and any children / dependents that you have.
- Payments of Estimated Federal, State, local taxes paid or paycheck withholding amounts paid over the tax year being filed.
- Previous years tax returns for you and you spouse.

Adjustments to your income

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

Income Documentation

- Alimony received
- Business or farming income - profit/loss statement, capital equipment information
- Cost Basis of Securities Sold
- Miscellaneous income: jury duty, gambling winnings, Medical Savings Account, scholarships, etc.
- Prior year installment sale information - [Forms 6252](#), principal and interest collected during the year, SSN and address for payer
- Rental property income and expenses: profit/loss statement, suspended loss information
- Social Security received
- [SSA-1099](#) for Social Security benefits received
- 1099-MISC Income: independent contractor forms
- [1099-S](#) form for income from sale of a property
- 1099-C forms for cancellation of debt
- [1099-R](#), [Form 8606](#) for distributions from IRAs or retirement plans
- 1099 – Interest and Dividend Income, Retirement, Annuities, tax refunds, Unemployment
- 1099-G unemployment income forms, or state / local tax refunds
- [1099-INT](#), [1099-DIV](#), 1099-B, or K-1s investment, interest income
- W-2 forms for you and your spouse

Tax Credit & Deduction for Individuals

- Adoption expenses
- Alimony Paid (need Social Security number of recipient)
- Casualty and theft losses, insurance reimbursements
- Charitable donations: official receipts/checks, cash amounts, donated property value, miles driven, out-of-pocket expenses
- Child Care Expenses provider's name, address, tax ID, \$ amount
- Work vehicle license fees, mileage
- Home business expenses, home size/office size, home expenses
- Investment interest expenses
- IRA contributions
- Medical and dental expense records
- Medical savings account
- Moving expenses
- Personal property taxes
- Real estate taxes paid
- Rental Property Expense & cost basis

Additional Documentation

Prior-year refund applied to current year and/or any amount paid with an extension to file

Foreign bank account information: location, name of bank, account number, peak value of account during the year