



TAX PREP CHECKLIST

ALL FILERS

- Name as it appears on Social Security Card
- Copy of last year's return (preferred; not required)
- SSC/Birth Certificate for yourself, spouse, and dependents
- Dates of birth for yourself, spouse, and dependents
- Bank account number, and routing number
- Home Address
- Form 8832 if your dependent child's custodial parent is releasing their right to claim the child as a dependent

INCOME

- W-2'S
- 1099-G FORM FOR UNEMPLOYMENT INCOME
- 1099-INT, 1099-DIV, and 1099-B for Interest, dividends, and stock sales
- 1099-R and SSA-1099 for retirement plan distributions, and Social Security Benefits
- 1099-S for income from the sale of your home or other property

INCOME

- 1099-MISC for income from a rental property
- 1099-Q for distributions from a 529 plan / Coverdell ESA
- 1099-SA for distributions from a health saving account (HSA)
- Schedule K-1 for income from a pass-through business, trust, or estate
- Alimony received (if your divorce or separation agreement is dated on or before December 31, 2018)
- Records of any transactions involving cryptocurrency
- Information on other sources of income, such as gambling winnings, jury duty pay, cancellation of debt, etc.

SMALL BUSINESS OWNERS

- TAX ID
- 1099-NEC or 1099-K showing income as an independent contractor
- Insurance Premiums & Expenses
- Mileage Logs
- Documentation for home office expenses, including square footage of home and square footage of area used for business
- Records for business assets to be depreciated, including cost and date placed in service



TAX PREP CHECKLIST

1. DEDUCTIONS

- Out of pocket medical expenses
- Premiums for long term care insurance
- Form 1098 showing mortgage interest, premiums, and points paid by you
- Real estate taxes
- State and local income taxes
- Charitable donations
- Documentation of casualty losses (if you lived or owned property in a federally declared disaster area)
- Moving & Job Search Expenses
- Volunteer Expenses

TAX CREDITS

- Form 1098-T showing expenses for higher education
- Child care costs and care provider's name, address, and tax identification number
- Adoption costs and Social Security number child you legally adopted during 2022
- Form 1095-A if you purchase health insurance through the Health Insurance Marketplace

2. DEDUCTIONS

(ADJUSTMENTS TO INCOME YOU CAN CLAIM EVEN IF YOU DON'T ITEMIZE)

- Form 1098-E for student loan interest
- Records of contributions to an HSA, IRA, SEP or self-employed retirement plan
- Alimony paid (for divorce or separation agreements dated on or before December 31, 2018)
- For teachers, expenses paid for classroom supplies
- Premiums paid for self-employed health insurance
- Records for any stocks or other investments that became totally worthless or you expect to claim a loss, including date of purchase and original purchase price

S CORPORATION

- IRS acceptance letter of S election
- A copy of the business' bylaws and articles of incorporation. If an LLC taxed as an S corporation, copies of the LLC articles of organization and operating agreement
- EIN Number
- Information regarding any:
 - capital contributions, distributions or loans to shareholders.
 - reasonable compensation paid to any employee/shareholder
 - insurance plan provided to any shareholder
 - number of shares of all shareholders