

Tax Prep Checklist

Personal Information

- SSNs or TINS, full names and birthdates for everyone included on your tax return
- Amount of alimony paid and ex-spouse's SSN
- Childcare records (including the provider's TIN) if applicable

Income/Investments/Retirement

- All forms that say W-2, 1098, 1099 or Schedule K-1
- Purchase date and total investment in any stock or property you sold
- Expenses related to your investments
- Records of any contributions you made to IRAs, other retirement plans, and 529 plans or education savings accounts
- Records of business income and expenses if you are an independent contractor, self-employed or own rental real estate

Education

- Education scholarships and fellowships
- Records of tuition and other higher education expenses and Form 1098-T

Itemized Deductions

- Form 1098
- Mortgage Interest, real estate and personal property tax receipts
- Prior year amount of state/local income tax paid
- Records of cash amounts donated to houses of worship, schools or other charitable organizations
- Records of non-cash charitable donations
- Job-search/moving expenses if applicable

Healthcare

- Form 1095-A if you enrolled in an insured plan through the Marketplace Exchange
- Marketplace exemption certificate if you applied for and received an exemption
- Form 1095-B or Form 1095-C if you have insurance through a private plan or employer
- HSA information (Forms 5498, 1099-SA) and receipts for medical expenses

Copy of Prior Year Tax Return