Tax Return Preparation Checklist

- [ ] **Copies of your last 3 years' tax returns** *(new clients)*
  There is valuable information that a new tax preparer needs from these returns or they may be able to amend them and get you a better refund.
- [ ] **Social Security Number and Date of Birth**
  Taxpayer, spouse, and all dependents being claimed on the tax return. Must have signed IRS Form 8332 to claim non-custodial dependents.
- [ ] **W-2 Forms**
  For all jobs worked in the current year for taxpayer, spouse, and all dependents.
- [ ] **Last paycheck stub of the current year**
  For all jobs worked in the current year for taxpayer, spouse, and all dependents. Valuable information is presented on the stub such as deductions made to charitable organizations.
- [ ] **1099 Forms for interest, dividends, retirement, social security, debt cancellation, unemployment, etc.**
  Forms are matched and need to be entered correctly on the tax return to comply with the IRS matching program.
- [ ] **Year-End Mutual Funds Statement**
  Lists transaction detail for the year to properly record capital gains and losses.
- [ ] **Year-End IRA Statement**
  Lists transaction detail for the year to properly record deductions for eligible contributions.
- [ ] **Form 1098 Mortgage Interest**
  Details how much in mortgage interest you paid in the current year. This form is matched and needs to be entered correctly on the tax return to comply with the IRS matching program.
- [ ] **Property Tax Statements**
  Lists tax deductible property tax paid as well as special assessments that are not deductible.
- [ ] **Child Care Provider Information**
  Name, address, social security or tax id number, and amount paid for each child to each provider (summer camp, before and after school care included).
- [ ] **Business Income and Expenses**
  Financial statements, 1099-MISC (received and filed for anyone you paid $600 or more for services in connection with your business), receipts for asset purchases.
- [ ] **Form K-1**
  Investment in Partnership, S Corporation, Estate or Trust.
- [ ] **Form 1098-T**
  Post-secondary tuition statement.
- [ ] **1098-E**
  Student Loan interest statement.
- [ ] **1098-C**
  Donation of automobile or boat.
- [ ] **1095-A, B, or C**
  These forms will report health insurance information for each covered individual.

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- [ ] **Charitable Donations** *(cash and/or noncash)*
  Name and address of charitable organization (both). Receipt or statement of amounts donated by cash, check or credit card. Description of item, date, place, fair market value, and original cost of noncash items.
- [ ] **Adoption Costs**
  Legal adoption documents will need to be attached to the tax return if applicable.
- [ ] **New Home Purchase**
  Purchase papers have valuable tax deductible information on them.
- [ ] **Energy Savings Home Improvements**
  Copies of receipts. You may qualify for a tax credit.
- [ ] **Direct Deposit Information**
  Routing and account number for savings or checking accounts you want your refund deposited into.