Tax Preparation Checklist

* **Copies of 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 then and get you a better refund.

* **Social Security numbers and date of birth**

Taxpayer, spouse, and all dependents being claimed on the tax return. Signed IRS form 8332 for non-custodial dependents being claimed. Adoption paperwork will need to be attached to tax return if applicable.

* **W-2 and 1099 forms**

Showing total wages paid to taxpayer, spouse and dependents.

* **Last paycheck stub of the current year**

For all jobs worked in the current year for taxpayer, spouse and all dependents. There may be valuable information presented on it pertaining to additional deductions.

* **Childcare Provider information**

Name, address, social security and/or tax id number and amount paid for each dependent child to each provider.

* **New home purchase**

Purchase contract have valuable tax-deductible information on them.

* **Home improvement**

Energy saving improvement receipts may qualify you for tax credits.

* **Form 1098 Mortgage interest**

Details how much interest you paid in the current year and this needs to be entered correctly to comply with IRS matching.

* **Property tax statements**

Lists tax deductible property tax paid as well as special assessments not deductible.

* **Charitable donations**

Name, address of charitable organization and receipt/statement of amounts donated by cash/check/credit card. Description of item, date, fair market value and original cost for non-cash donations.

* **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) and asset purchase receipts.

* **Rental property income and expenses**

Profit/loss statements, suspended loss information and receipts for expenses.

* **Business use of home**

Receipts for home business expenses, home/office size and home expenses

* **Year-End IRA statement**

Lists transaction detail for the year to properly record deductions for eligible contributions.

* **Year-End Mutual Funds statement**

Lists transaction detail for the year to properly record capital gains and losses.

* **Form K-1**

Investment in Partnership, S Corporation, Estate or Trust.

* **Form 1098-T**

Post-secondary tuition statement.

* **Form 1098-E**

Student loan interest statement

* **Form 1098-C**

Donation of automobile or boat.

* **Forms 1095-A, B or C**

These forms report health insurance information for each covered individual.

* **1099 Forms**

Interest, dividends, retirement, social security, debt cancellation, unemployment and etc. forms are matched in compliance with IRS matching.

* **Teachers**

Cancelled checks or receipts for expenses paid for classroom supplies, etc.

* **Health/dental**

Medical and dental expense records with receipts.

* **Direct deposit information**

Routing and account number for checking or saving accounts you want your refund deposited into.