**2019 Tax Prep Checklist:**

#### **Personal Information**

* Your social security number or tax ID number
* Your spouse's full name and social security number or tax ID number

#### **Dependent(s) Information**

* Dates of birth and social security numbers or tax ID number
* Childcare records (including the provider's tax ID number) if applicable

#### **Sources Of Income**

* Forms W-2
* Unemployment, state tax refund (1099-G)
* Forms 1099, Schedules K-1, income records to verify amounts not reported on 1099s
* Records of all expenses — check registers or credit card statements, and receipts
* Business-use asset information (cost, date placed in service, etc.) for depreciation
* Office in home information, if applicable
* Record of estimated tax payments made (Form 1040–ES)

**Rental Income**

* Records of income and expenses
* Rental asset information (cost, date placed in service, etc.) for depreciation
* Record of estimated tax payments made (Form 1040–ES)
* **Retirement Income**
* Pension/IRA/annuity income (1099-R)
* Traditional IRA basis (i.e. amounts you contributed to the IRA that were already taxed)
* Social security/RRB income (1099-SSA, RRB-1099)

**Savings & Investments or Dividends**

* Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
* Income from sales of stock or other property (1099-B, 1099-S)
* Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)
* Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
* Expenses related to your investments
* Record of estimated tax payments made (Form 1040–ES)

**Other Income & Losses**

* Gambling income (W-2G or records showing income, as well as expense records)
* Jury duty records
* Hobby income and expenses
* Prizes and awards
* Trusts
* Royalty Income 1099–Misc.
* Any other 1099s received
* Record of alimony paid/received with ex-spouse’s name and SSN

#### **Types of Deductions**

**Home Ownership**

* Forms 1098 or other mortgage interest statements
* Real estate and personal property tax records
* Receipts for energy-saving home improvements (i.e. solar panels, solar water heater)
* All other 1098 series form

**Charitable Donations**

* Cash amounts donated to houses of worship, schools, other charitable organizations
* Records of non-cash charitable donations
* Amounts of miles driven for charitable or medical purposes

**Medical Expenses**

* Amounts paid for healthcare insurance and to doctors, dentists, hospitals

**Health Insurance**

* Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)
* Form 1095-B and/or 1095-C if you had insurance coverage through any other source (i.e., an employer, insurance company, or government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc.)
* Marketplace exemption certificate (ECN) if you applied for and received an exemption from the Marketplace (Exchange)

**Childcare Expenses**

* Fees paid to a licensed day care center or family day care for care of an infant or preschooler
* Wages paid to a baby-sitter
Don't include expenses paid through a flexible spending account at work

**Educational Expenses**

* Forms 1098-T from educational institutions
* Receipts that itemize qualified educational expenses
* Records of any scholarships or fellowships you received
* Form 1098-E if you paid student loan interest

**K-12 Educator Expenses**

* Receipts for classroom expenses (for educators in grades K-12)

**State & Local Taxes**

* Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
* Invoice showing amount of vehicle sales tax paid

**Retirement & Other Savings**

* Form 5498-SA showing HSA contributions
* Form 5498 showing IRA contributions
* All other 5498 series forms (5498-QA, 5498-ESA)

**Federally Declared Disaster**

* City/county you lived/worked/had property in
* Records to support property losses (appraisal, clean up costs, etc.)
* Records of rebuilding/repair costs
* Insurance reimbursements/claims to be paid
* FEMA assistance information
* Check FEMA site to see if my county has been declared a federal disaster area