

Please print the Tax To-Do List below, look it over, and check off those items you have handy for your tax return.

General Taxable Income

- W-2 Form(s) for Wages, Salaries and Tips
- Interest Income Statements: Form 1099-INT & 1099-OID
- Dividend Income Statements: Form 1099-DIV
- Sales of Stock, Land, etc.: Form 1099-B
- Sales of Real Estate: Form 1099-S
- State Tax Refunds: Form 1099-G
- Alimony Received or Paid
- Unemployment Compensation Received
- Miscellaneous Compensation Received
- Gambling Income: W-2G

Retirement Income

- Retirement Income: Form 1099-R
- Social Security Income and Railroad Retirement Income: Form SSA-1099

Business Income

- Business Income and Expenses
- Rental Income and Expenses
- Farm Income and Expenses
- Form K-1 Income from Partnerships, Trusts, and S-Corporations
- Total Miles Traveled for year Business and Personal

Tax Credits Checklist

- Child Care Provider Address, I.D. Number and Amounts Paid
- Adoption Expense Information
- Foreign Taxes Paid

Expense and Tax Deduction Checklist

- College Tuition Statements, Forms 1098-T and PACT Statements
- Student Loan Interest Statements
- Medical Expenses for the Family
- Medical Insurance Paid
- Prescription Medicines and Drugs
- Doctor and Dentist Payments
- Hospital and Nurse Payments
- Tax Deductible Miles Traveled for Medical Purposes
- Home Mortgage Interest from Form 1098

- Home Second Mortgage Interest Paid
- Real Estate Taxes Paid
- State Taxes Paid with Last Year's Return (if itemized)
- Personal Property Taxes Paid
- Charitable Cash Contributions
- Fair Market Value of Non-cash Contributions to Charities
- Unreimbursed Expenses Related to Volunteer Work
- Miles Traveled for Volunteer Purposes
- Casualty and Theft Losses
- Unreimbursed Expenses Related to Your Job
- Miles Traveled Related to Your Job
- Union and Professional Dues
- Investment Expenses
- Job-hunting Expenses
- IRA Contributions
- Student Loan Interest Paid
- Moving Expenses
- Last Year's Tax Preparation Fee
- Gambling Expenses

Tax Estimate Payments Checklist

- Estimated Tax Payments Made with ES Vouchers
- Last Year's Tax Return Overpayment Applied to This Year
- Off Highway Fuel Taxes Paid

General Information

- Copy of Last Year's Tax Return
- Social Security Numbers and Birthdates for You, Your Spouse and Dependents
- Educational Expenses for You, Your Spouse and Dependents
- Dependents' Post High School Educational Expenses
- Child Care Expenses for Each Dependent
- Routing Transmit Number (RTN) (for direct deposit/debit purposes)
- Bank Account Number (BAN) (for direct deposit/debit purposes)

Health Insurance

- Forms 1095-A
- Number of Months of Coverage
- Exemption from Coverage if Applicable and Detail of Exemption
- Dependents Not Claimed though Eligible