





PERSONAL TAX CHECKLIST

PERSONAL INFORMATION
For you, your spouse and dependents

- Full Legal Name(s)
- Social Security Number(s) or Tax ID Number(s)
- Date(s) of birth
- Last Year's Tax Return

DEDUCTIONS
Make sure you don't miss out on deductions and credits you qualify for.

-  Do you own a house?
-  Did you pay for childcare?
-  Did you contribute to an IRA or Health Savings Account?
-  Did you have a big life change this year?

INCOME
How did you make money this year? Gather the documents that apply to your situation.

- Personal Income Statements**
W-2 for each job held during the tax year by you, your spouse and any dependents. Self-employed? All financial records, as well as all Forms 1099-MISC.
- Investment or Interest Income Statements**
Forms 1099-INT, 1099-DIV, 1099-OID and 1099-B, as well as the Schedule K-1.
- Pension/IRA/Annuity Income**
Form 1099-R
- Income From Home or Property Sale**
Form 1099-S
- Unemployment Compensation and State Tax Refunds**
Form 1099-G
- HSA and Long-Term Care Reimbursements**
Forms 1099-SA and 1099-LTC
- Social Security/RRB Income**
Forms SSA-1099 and RRB-1099
- Trust and Estate Beneficiary Earnings**
Form 1041

Running a Small Business? We've got you covered. Check out the [Small Business Tax Checklist](#).

Check out some common options on page 2.

PERSONAL TAX CHECKLIST

COMMON DEDUCTIONS

Do you qualify for any of these deductions? Here's what you'll need if you do.

- Homeowner Expenses**
Mortgage interest statements (Form 1098), property tax payment receipts, energy efficient upgrade receipts (Form 5695) and qualified moving expense receipts for work-related moves more than 50 miles.
- Education Expenses**
Tuition statements, itemized receipts of qualified educational expenses (Form 1098-T) and student loan interest statements (Form 1098-E).
- Charitable Contributions**
Detailed list of donations, receipts for contributions over \$250 and Form 1023 for vehicle donations.
- Self-Employment Expenses**
Records of business/home-office expenses, assets, pension plan contributions, health insurance payments and estimated tax payment receipts (state and federal).
- Child and Dependent Care Expenses**
Name, address and tax ID or Social Security number of the provider.
- Health Care Expenses**
Records of medical and dental costs.
- Alimony Expenses**
Your ex spouse's full name and Social Security number.
- Job Hunting and Job-Related Educational Expenses**
Records of expenses
- IRA Contributions**
Form 5498
- Health Savings Account Contributions**
Form 5498-SA
- Tax Payments**
Receipts for all state and federal taxes, property taxes, vehicle license fees and sales tax.
- Tax Preparation Expenses**
Receipt for having last year's taxes professionally prepared.