Tax Preparation Document Checklist

This checklist includes the initial documentation needed to prepare your tax return. Not all documents apply to every situation. Please gather only the items that apply to you.

Basic personal information

● Valid photo identification (driver's license, passport, or other government-issued ID).

Income – Employment

● Forms W-2 from all employers.

Other income (if applicable)

● Forms 1099: 1099-INT, 1099-DIV, 1099-R, 1099-G, 1099-B, SSA-1099 / RRB-1099, 1099-S.

Self-employment and independent work (1099)

● Records of total income for the year.

● Business expenses such as: supplies, equipment, software or subscriptions, phone and internet (business use), advertising, vehicle mileage (if applicable), home office expenses (if applicable).

Rental property income

● Rental income received.

● Related expenses: repairs, property taxes, insurance, mortgage interest.

● Purchase date and purchase price of the property.

● Address of the rental property or properties.

Common deductions (if applicable)

● Home: Form 1098 (mortgage interest), property taxes, eligible energy-efficient improvements.

● Education: Form 1098-T, student loan interest (Form 1098-E).

Tax credits (if applicable)

● Child and dependent care expenses (provider name, address, tax ID, and amount paid).

● Education credits.

● Contributions to traditional or Roth IRA and employer-sponsored retirement plans.

Health insurance (if applicable)

- Forms 1095-A, 1095-B, or 1095-C.
- HSA: Form 5498-SA (contributions) and Form 1099-SA (distributions).

Special situations (if applicable)

- Schedule K-1.
- Alimony paid (only if the divorce or separation agreement was executed before 2019; agreements after that year are not deductible).
- Special forms such as: 4562, 8829, 8832, 8379.

Additional helpful information

- Prior year federal and state tax returns.
- Recent notices from the IRS or state tax authorities (if any).

How to organize your documents

- Group documents by category (income, expenses, credits).
- Use PDF files or clear photos.
- Name files clearly (e.g., W2-EmployerName.pdf).
- Do not send unnecessary documents.

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