



Personal Tax Document Checklist

Tax documents and Forms to Bring In

- All W-2's
- Social Security
- 1099 INT/DIV
- 1099 MISC
- 1099 G
- Other 1099
- K-1 Partnerships & S Corp

Other Income and Expenses

- Alimony Received/Paid
- Scholarships/Grants
- IRA Contributions/Withdrawal
- 1098-T Education Tuition Expense
- Self Employed
- Jury Duty Pay (not reimbursed)
- Gambling & Lottery
- Non-taxable Income
- Adoption Expenses
- Investment Income
- Tips
- Investment Expenses
- Interest Paid on Student Loans
- Child Care Expenses
Name, EIN# or SSN#, amount paid,
address

Possible Deductions and Credits

- Medical Miles/Transportation
- Out of pocket Medical/Dental Insurance
- HSA or Similar Contribution
- Medical Expenses (not reimbursed)
Prescriptions, glasses/contacts, dental,
medical, hearing aids, hospital &
emergency,
surgery, labs & x-rays, travel & lodging,
therapy treatments, wheelchair, cane,
crutches, orthopedic shoes, in-home care.

Taxes and Interest You Paid

- State Income Tax Payments
- Real Estate Tax/Property tax
- 1098 Home Mortgage Interest
- Points Paid at Closing

Charitable Contributions/Volunteer Expenses

- Church
- College
- Non-profit
- Furniture/Clothing Donation
- Volunteer Expenses (out of pocket)
- Volunteer Miles Drive

Estimated Tax Payments Made

Date _____ Federal \$ _____ State \$ _____

Date _____ Federal \$ _____ State \$ _____

Date _____ Federal \$ _____ State \$ _____

Date _____ Federal \$ _____ State \$ _____

Additional Information

*If you own a rental property see Schedule E Checklist

*If self-employed see Schedule C Checklist

*If you use QuickBooks to track income and expenses bring in a backup copy on a flash drive