



# 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

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\*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