

# Tax Prep Checklist

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## Personal info

A Social Security or tax ID number for everyone included on your tax return


Date of birth for everyone on your return



## Income and investments

Form W-2, Wage and Tax Statement

Bank or financial institution statements

Last year's state refund amount 

Other miscellaneous income records

Any Form 1099s

Information about stocks that you traded or sold (Forms 8945 and 8949)




## Self-employment and business records

Business expense records

Quarterly estimated tax payment receipts

Mileage records

Home office expenses 



## Medical expense records

Receipts for unreimbursed medical expenses

Health insurance coverage forms (Form 1095s)

Social Security benefits



## Retirement

Retirement plan contributions and distributions

- Form 5498: IRA Contributions Information
- Forms 1099-R: Distributions From Pensions, Annuities, Retirement, etc.

Form 1099-DIV

Form 1099-INT



## Education

Tuition and qualified expenses paid (Form 1098-T) 

Student loan interest paid (Form 1098-E)



## Homeownership info

Property tax receipts

Mortgage interest paid (Form 1098 Mortgage Interest Statement)



## Charitable Donations

Charitable donation receipts: must include the date, value, and charitable organization



## Federally Declared Disaster Records

Damage documentation