

Tax Preparation Checklist

All Tax Filers

SSN and DOB (yourself & dependents)	Bank account & routing number
Copy of last year's return	W2's from all employers
1099 forms for other income/benefits	Charitable contributions
Medical/Dental expenses	Health insurance premiums
Current Driver's License	

Rental Property Owners

Rental income	Receipt for all expenses
Insurance premiums	Real estate taxes paid
Mileage for inspection & repairs	Mortgage interest

Residential Property Owners

1098 form (mortgage interest)	Closing documents if you bought/sold during the year
Real estate taxes paid	Insurance Premiums
Receipt from energy efficient upgrades	

Business Owners

Tax ID	Business income & expenses
List of capital assets & equipment	Quarterly taxes paid
Business use of home (if applicable)	12/31 bank balance
Mileage log	

Other

Retirement plan contributions	Childcare expenses
Sales tax from vehicle purchase	Job search & moving expenses
FEMA assistance	Educational expenses