

Tax Preparation Checklist

ALL TAX FILERS

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| <input type="checkbox"/> SSN and DOB (yourself & dependents) | <input type="checkbox"/> 1099 forms for other income/benefits |
| <input type="checkbox"/> Bank account & routing number | <input type="checkbox"/> Charitable contributions |
| <input type="checkbox"/> Copy of last year's return | <input type="checkbox"/> Medical/Dental expenses |
| <input type="checkbox"/> W2's from all employers | <input type="checkbox"/> Health insurance premiums |

RESIDENTIAL PROPERTY OWNERS

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| <input type="checkbox"/> 1098 form (mortgage interest) | <input type="checkbox"/> Closing documents if you bought/sold during the year |
| <input type="checkbox"/> Receipt from energy efficient upgrades | |
| <input type="checkbox"/> Insurance premiums | |
| <input type="checkbox"/> Real estate taxes paid | |

RENTAL PROPERTY OWNERS

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| <input type="checkbox"/> Rental income | <input type="checkbox"/> Mileage for inspection & repairs |
| <input type="checkbox"/> Receipt for all expenses | <input type="checkbox"/> Mortgage interest |
| <input type="checkbox"/> Insurance premiums | |
| <input type="checkbox"/> Real estate taxes paid | |

BUSINESS OWNERS

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|---|---|
| <input type="checkbox"/> Tax ID | <input type="checkbox"/> Business use of home (if applicable) |
| <input type="checkbox"/> Business income & expenses | <input type="checkbox"/> 12/31 bank balance |
| <input type="checkbox"/> List of capital assets & equipment | <input type="checkbox"/> Mileage log |
| <input type="checkbox"/> Quarterly taxes paid | |

OTHER

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|--|---|
| <input type="checkbox"/> Retirement plan contributions | <input type="checkbox"/> Job search & moving expenses |
| <input type="checkbox"/> Childcare expenses | <input type="checkbox"/> Educational expenses |
| <input type="checkbox"/> Sales tax from vehicle purchase | <input type="checkbox"/> FEMA assistance |