

TAX PREP CHECKLIST

ALL TAX FILERS

- W-2, W-2P and/or K-1 Forms
- SSN & DOB for Dependents
- Medical/Health Insurance Expenses and/or Premiums
- 1099 Forms for All Income
- Prior Year Tax Return
- Charitable Contributions
- Lender Loan Statements

HOME OWNERS *(including rentals)*

- Mortgage Interest Statement
- Energy Upgrade Receipts
- Insurance Premiums
- Mileage for Rent Issues
- Real Estate Taxes
- Refinance or Purchase Docs
- Rental Income

BUSINESS OWNERS

- Prior Year Tax Return
- Mileage Reports
- Tax ID Number/Legal Name
- Detailed Income/Expenses
- Assets and Equipment List
- Health Insurance Premiums

ADDITIONAL ITEMS

- Estimated Tax Payments
- Education (Tuition, Interest, etc)
- Childcare (Name, Address, SSN/Fed ID + \$ Paid)
- College Savings Contributions
- IRA/HSA Contributions
- IRS/State DOR Correspondence