



## Tax Preparation Checklist

### **\*\*Required for All Taxpayers**

- SSN, DOB (you Spouse and all dependents)
- Bank Routing and accounting number
- Copy of Last year's return (unless returning client)
- W2's from all employers
- Medical and Dental expenses
- Health Insurance Premiums
- Charitable Contributions
- 1099 from all income or benefits

### Homeowners

- Form 1098 Mortgage Interest
- Closing documents if you bought or sold a house this year
- Insurance Premiums
- Receipts from energy efficient upgrades
- Real Estate taxes paid

### Other Documents

- Childcare Expenses
- Adoption Expenses
- Retirement Plan contributions
- Educator Expenses
- Education Expenses/ 1098T
- Sales tax (Vehicle Purchase)

### Rental Property Owners

- Real Estate Taxes Paid
- Mortgage Interest form 1098
- Insurance Premiums
- Rental Income
- Receipts for all rental expenses including repairs

### Business Owners

- Tax ID Number
- All business income and expenses
- Profit Loss log or year ending bank log
- Quarterly taxes paid
- List of Capital assets & equipment
- Business Use of Home if applicable (square footage)
- Mileage Log