

# 2017 Tax Preparation Checklist

## Personal Taxes



### Personal Information

- Your social security number or tax ID number (Copy of SS Card and Drivers License or State ID)
- Your spouse's full name and social security number or tax ID number
- Amount of any alimony paid and ex-spouse's full name and social security number
- NEW CLIENTS** – Copies of your tax returns for the previous two years.
- Proof of Health Insurance coverage

### Education Payments

- Forms 1098-T from educational institutions
- Receipts that itemize qualified educational expenses
- Records of any scholarships or fellowships you received, Form 1098-E if you paid student loan interest

### Self-Employment Information

- Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s
- Records of all expenses — check registers or credit card statements, and receipts
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Office in home information, if applicable

### Information About Other People Who May Belong on Your Return

- Dates of birth and social security numbers or tax IDs (Copies of SS Cards)
- Childcare records (including the provider's tax ID number & address) if applicable
- Income of other adults in your home (if claiming ACA Credit)
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

### Employee Information

- Forms W-2

### Business Use of Vehicle Information

- Log showing total miles driven for the year (or beginning/ending odometer readings), total business miles driven for the year (other than commuting), and the business purpose of the mileage
- Amount of parking and tolls paid
- If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

### Retirement Income

- Pension/IRA/annuity income (1099-R)
- Social security/RRB income (1099-SSA, RRB-1099)

### Other Deductions and Credits

- Receipts for classroom expenses (for educators in grades K-12 if more than \$250)
- Form 5498-SA showing HSA contributions or withdrawals
- Record of moving expenses not reimbursed by employer if more than 50 miles
- Forms 1098 or other mortgage interest statements

## Rental Property Income

- Records of income and expenses
- Rental asset information (cost, date placed in service, etc.) for depreciation

## Other Income

- Unemployment, state tax refund (1099-G)
- Gambling income (W-2G or records showing income, as well as expense records)
- Amount of any alimony received
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Other 1099

## IRA Information

- Form 5498 showing IRA contributions
- Traditional IRA basis

## If you were affected by a federally declared disaster

- City/county you lived/worked/had property in
- Records to support property losses (appraisal, clean up costs, etc.)
- Records of rebuilding/repair costs
- Insurance reimbursements/claims to be paid
- FEMA assistance information
- Check [FEMA](#) site to see if my county has been declared a federal disaster area

## Other Deductions and Credits, Cont.

- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Real estate and personal property tax records
- State registration form, front and back
- Cash amounts donated to houses of worship, schools, other charitable organizations
- Receipts of non-cash charitable donations
- Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- Amount of miles driven for charitable or medical purposes
- Expenses related to your investments – Advisor fees
- Amount paid for preparation of last year's tax return
- Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
- Job-hunting expenses
- Receipts for energy-saving home improvements
- Record of estimated tax payments made
- Form 1095-A marketplace healthcare premiums
- Health insurance subsidies received – Form 1095A

## Savings and Investments

- Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-S)
- Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)