A close up of a sign

Description automatically generated**TAX** PREP **CHECKLIST**

Gambling income (as well as expense records)

Voided Check

Personal property statement

Real estate taxes paid

**\*\*\*Please Categorize and Summarize All Expenses\*\*\***

**(Keep Supporting Documents For Your Records)**

**Supply Stimulus Information**

Form 1095-A if you enrolled in an

insurance plan (exchange)

Record of alimony paid/received

w/ex-spouses name and SSN

Bank Account / Routing Numbers

b

**EVERYONE**

**IF YOU OWN A PERSONAL RESIDENCE**

**IF YOU OWN RENTAL PROPERTY**

**IF YOU OWN A BUSINESS**

**OTHER**

Full name, SSN & DOB (Dependents

SSN’s & DOB)

Past 2 years of tax returns -**New client only**

W2’s from all employers

Charitable contributions totaled

Medical expenses {including mileage}

Health insurance premiums

1099

forms for all other income or benefits

Mortgage interest (Form 1098)

Receipts from energy efficient upgrades

Closing documents if you bought

or sold during the year

Rental income

Receipts for all expenses

Mileage for repairs, inspections, etc.

Insurance premiums

Real estate taxes paid

Mortgage interest

Tax ID

List of capital assets and equipment

Business income and expenses

12/31 bank balances

Business use of home info, if applicable

Yearly totaled mileage from log

Quarterly taxes paid

Retirement plan contributions

Childcare expenses

Educational expenses - loan interest,

tuition, and supplies

Sales tax from vehicle purchase

Record of estimated tax payments

Long Term Care Insurance Premiums