

Tax Checklist

<input type="checkbox"/>	Prior year's tax return (new clients)
<input type="checkbox"/>	Driver's license
<input type="checkbox"/>	Birthdates and social security numbers
<input type="checkbox"/>	Records of estimated tax payments made
<input type="checkbox"/>	W-2 statements
<input type="checkbox"/>	All 1099 statements
<input type="checkbox"/>	K-1 statements from estates, trusts, etc.
<input type="checkbox"/>	Year-end statements for mutual fund and brokerage accounts
<input type="checkbox"/>	Last pay stub and last pension statement
<input type="checkbox"/>	Foreign bank and retirement statements
<input type="checkbox"/>	Contributions to IRA or HSA
<input type="checkbox"/>	Property taxes paid; vehicle registration paid
<input type="checkbox"/>	Student loan interest paid (Form 1098E)
<input type="checkbox"/>	Tuition paid to a college/university (Form 1098T)
<input type="checkbox"/>	State and local income taxes paid
<input type="checkbox"/>	Mortgage interest paid (Form 1098)
<input type="checkbox"/>	Charitable contributions – cash totals and non-cash valuations, totaled
<input type="checkbox"/>	Childcare expenses and provider's name, address, and SSN or EIN
<input type="checkbox"/>	Alimony received or paid – if paid, need payee's SSN
<input type="checkbox"/>	Marketplace medical insurance: 1095 series forms
<input type="checkbox"/>	Medical expenses and insurance premiums paid
<input type="checkbox"/>	Closing statements for home purchase or sale
<input type="checkbox"/>	Cost and date of purchase of any business property or investments sold
<input type="checkbox"/>	Rental/business/farm income and expenses, basis of property and improvements, depreciation info
<input type="checkbox"/>	Dependent information: Name, DOB and SSN