



Tax Document Checklist

- All forms that say W-2, 1098, 1099, or (Schedule) K-1
- Records of other income (rental, jury duty, gambling, hobby, alimony, interest income, social security, unemployment, etc.)
- Social Security Cards and birthdates for everyone included on your return (you, your spouse, children, parents, etc.)
- Last year's tax return and amount paid for preparing the tax return (New clients only)
- Income and expense records for work you performed (not shown on a W-2 or 1099)
- Purchase date and your total investment in any stocks or other property you sold
- Expenses related to your investments
- Records of any contributions you made to IRA or other retirement plans
- Records for Mortgage interest, real estate and personal property tax (car registration)
- Amount donated to houses of worship, schools and other charitable organizations
- Records of non-cash charitable donations
- Number of miles driven for charitable or medical purposes
- Amounts paid for health care insurance and to doctors, dentists, hospitals, etc. (including co-pays and out of pocket expenses)
- Records to support childcare (provider's name, address, SSN or EIN, and phone number) and higher education costs
- Employment-related expenses (dues, travel, publications, tools, uniform costs and cleaning, etc.)
- Job search expenses
- Valid Photo ID
- Records showing sales tax for major purchases (car, boat, major appliance, etc.)