

# Income Tax- Preparation Checklist



## Basics

- Full name, SSN & DOB
- Copy of last year's tax return
- W2's from all employees
- 1099 forms for all other income or benefits

## Home and Rental Properties

- Mortgage interest form (1098)
- Receipts of any energy efficient upgrades
- Insurance premiums
- Purchase / Closing documents
- Rental income
- Paid real estate taxes
- Mortgage interest

## Business Owners

- Tax ID
- List of all assets and equipment
- Business income and expenses
- Mileage Logs
- Quarterly taxes paid
- Insurance premiums

## Deductions

- Health insurance premiums
- Medical & Dental expenses
- IRA & HSA contributions
- FEMA assistance
- Retirement plan contributions
- Vehicle purchase sales tax
- Childcare expenses
- Job & moving expenses
- Educational Expenses- loan, interest, tuition etc.

## Other

- Charitable contribution receipts
- Volunteer expense deductions
- IRA / 401K total contributions
- Record of estimated tax payments