



# PERSONAL TAX CHECKLIST

Tax filing can be simple, as long as you have the right documents and know what to deduct. Need help gathering the right tax stuff? Use our checklist to get started.

## PERSONAL INFORMATION AND INCOME

- ☐ **For You, Your Spouse and Your Dependents**  
Full legal name, date of birth, Social Security number, driver's license and last year's tax return
- ☐ **Personal Income Statements**  
Wages - W-2 (for you and your spouse)  
Self-Employed - 1099 Misc., 1099 NEC, 1099-K, and/or Income Summary  
Rental Property - All 1099's and/or Income Summary by Property
- ☐ **Unemployment Income or State or Local Tax Refunds**  
Form 1099-G
- ☐ **Investment or Interest Income**  
1099-INT, 1099-DIV, 1099-B and Schedule K-1
- ☐ **Home or Property Sale**  
Form 1099-S
- ☐ **Pension / IRA / Annuity**  
Form 1099-R
- ☐ **Social Security / RRB Income**  
SSA-1099 and RRB-1099
- ☐ **S-Corp and Partnership Passthrough Earnings**  
Schedule K-1
- ☐ **Trust and Estate Beneficiary Earnings**  
Form 1041, Schedule K-1
- ☐ **HSA and Long Term Care Reimbursements**  
1099-LTC (distribution tax document)  
1099-SA (HSA distribution tax document)
- ☐ **Other Income**  
Alimony, Jury Pay, Gambling or Lottery Winnings



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## DEDUCTIONS

Here are the most common deductions. Do you have any of these to deduct?

- ☐ **Education Expenses**  
Tuition Statements, itemized receipts of qualified educational expenses (Form 1098-T), and student loan interest statements (Form 1098-E)
- ☐ **Homeowner Expenses**  
Mortgage interest statements (Form 1098), property tax payment receipts, and energy efficient upgrade receipts (Form 5695 if provided by installer)
- ☐ **Charitable Contributions**  
Detailed list of donations, receipts for contributions, and Form 1098-C for vehicle donations (or a letter confirming donation)
- ☐ **Self-Employment Expenses**  
Records of business/home office expenses, assets, pension plan contributions, health insurance payments, and estimated tax payment receipts (state and federal)
- ☐ **Child and Dependent Care Expenses**  
Name, address, and tax ID or Social Security number of the provider
- ☐ **Health Care Expenses**  
Any 1095 forms (for health care coverage) and records of medical and dental costs
- ☐ **Job-Related Educational Expenses**  
Records of expenses
- ☐ **IRA Contributions**  
Form 5498
- ☐ **Health Savings Account Contributions**  
Form 5498-SA
- ☐ **Alimony Expenses**  
Provide Ex-Spouse Full Name + SSN