

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**
W-2 (for you and your spouse) and all 1099-NEC or 1099-INT forms
- ☐ **UNEMPLOYMENT INCOME OR STATE OR LOCAL 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 DISTRIBUTION**
Form 1099-R
- ☐ **SOCIAL SECURITY INCOME**
SSA-1099
- ☐ **TRUST AND ESTATE BENEFICIARY EARNINGS**
Form 1041, Schedule K-1
- ☐ **HSA AND LONG-TERM CARE REIMBURSEMENTS**
1099-SA





COMMON DEDUCTIONS

Remember, the standard deduction has gone up again this year—\$13,850 for singles and \$27,700 for joint filers. But if your itemized expenses exceed these amounts, then don't take the standard—itemize! Here are the most common deductions. Do you have any of these to deduct?

YES NO

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EDUCATION EXPENSES

Tuition statements, itemized receipts of qualified educational expenses (Form 1098-T), and student loan interest statements (Form 1098-E)

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HOMEOWNER EXPENSES

Mortgage interest statements (Form 1098), property tax payment receipts, and energy efficient upgrade receipts (Form 5695 if provided by installer)

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CHARITABLE CONTRIBUTIONS

Detailed list of donations, receipts for contributions, and Form 1098-C for vehicle donations (or a letter confirming donation)

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SELF-EMPLOYMENT EXPENSES

Records of business/home office expenses, assets, pension plan contributions, health insurance payments, and estimated tax payment receipts (state and federal)

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CHILD AND DEPENDENT CARE EXPENSES

Name, address, and tax ID or Social Security number of the provider

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HEALTH CARE EXPENSES

Any 1095 forms (for health care coverage) and records of medical and dental costs

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IRA CONTRIBUTIONS

Form 5498

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HEALTH SAVINGS ACCOUNT CONTRIBUTIONS

Form 5498-SA

