

Personal Info

- Social Security numbers and dates of birth for you, your spouse, your dependents
- Bank account number and routing number (only required if you want your refund deposited directly into your account)
- Copy of Last Year's Tax Return (helpful but not required)

General Taxable Income

- W-2 Form(s)
- Interest Statements: Form 1099-INT & 1099-OID
- Dividend Income Statements: Form 1099-DIV
- Sales of Stock, Land, etc.: Form 1099-B
- Sales of Real Estate: Form 1099-S
- State Tax Refunds: Form 1099-G
- Alimony Received or Paid
- Unemployment Compensation Received
- Miscellaneous Income: Form 1099-MISC

Retirement Income

- Retirement Income: Form 1099-R
- Social Security and Railroad Retirement Income
- Form SSA-1099

Business Income

- Business Income and Expenses
- Rental Income and Expenses
- Farm Income and Expenses
- Form K-1 Income from Partnerships, Trusts, and S-Corporations
- Miles Traveled for Business Purposes

Tax Credits Checklist

- Child Care Provider Address, I.D. Number and Amounts Paid

- Adoption Expense Information (legal, medical & transportation costs)
- Foreign Taxes paid
- First Time Home Buyer Tax Credit

Expense and Tax Deduction Checklist

- Educational Expenses for You and Your Spouse
- Dependents Post High School Educational Expenses
- Medical Expenses for the Family
- Medical Insurance Paid
- Prescription Medicines and Drugs
- Doctor and Dentist Payments
- Hospital and Nurse Payments
- Miles Traveled for Medical Purposes
- Home Mortgage Interest from Form 1098
- Home Second Mortgage Interest Paid
- Real Estate Taxes Paid
- State Taxes Paid with Last Year's Return (if itemized)
- Personal Property Taxes Paid
- Contributions to Charities
- Unreimbursed Expenses Related to Volunteer Work
- Miles Traveled for Volunteer Purposes
- Casualty and Theft Losses
- Amount Paid to Professional Preparer Last Year
- Unreimbursed Expenses Related to Your Job
- Miles Traveled Related to Your Job
- Union and Professional Dues
- Investment Expenses
- Job-hunting Expenses
- IRA Contributions
- Student Loan Interest Paid
- Moving Expenses
- Last Year's Tax Preparation Fee

Tax Estimate Payments Checklist

- Estimated Payments Made with ES Vouchers
- Last Year's Tax Return Overpayment Applied to This Year
- Off Highway Fuel Taxes Paid