

# Tax Prep Checklist

Filing your taxes can be daunting. To help make the process more manageable and less stressful, here is a Tax Preparation Checklist to ensure you have all the documents you need when it's time to file.

## Income Documentation

- **W-2 forms:** From all employers over the tax year. Include one for you and your spouse if applicable.
- **1099 forms:** Various types (1099-MISC, 1099-NEC, 1099-G, etc.) for independent contracting work, interest earned, dividends, state tax refunds, and other form of various income.
- **Income from investments:** Be sure to include forms that show the sale of stocks, bonds, mutual funds, and other investments (1099-B, 1099-S).
- **Foreign income:** If applicable.
- **Rental property income:** Gather your records of income and associated expenses from any rental properties you may own.
- **Alimony received:** Collect documentation including amount and ex-spouse's SSN (if applicable).

## Deductions and Credits You May Include

- **Charitable donations:** Include any receipts from donations to charities you may have made throughout the year.
- **Medical and dental expenses:** Include any receipts for payments not covered by insurance.
- **Education expenses:** Include Form 1098-T for tuition, books, and supplies, and student loan interest documentation from Form 1098-E.
- **Mortgage interest:** Include Form 1098 from your lender.
- **State and local taxes paid:** Gather receipts of payments, including property taxes and state income or sales taxes.
- **Retirement contributions:** Include any 401(k) and/or IRA contributions documentation.
- **Energy-efficient home improvements:** Gather receipts for qualifying energy improvements.

## Records of Taxes Paid

- **State and local income taxes:** From the previous year if not already deducted or refunded.
- **Estimated tax payments:** Records of estimated federal and state tax payments made during the year.

## Previous Year's Tax Return

- **State and local income taxes:** From the previous year if not already deducted or refunded.
- **Estimated tax payments:** Records of estimated federal and state tax payments made during the year.

## Miscellaneous

- **Childcare expenses:** Include records of payments to childcare providers, daycare expenses etc., including their tax ID numbers.
- **Records of business income and expenses:** Be sure to include any applicable income and documentation associated with your company if you're self-employed or own a business.
- **Educational scholarships or fellowships:** If you've received any monetary rewards for your education, you may want to include any applicable documentation you have associated with it.
- **Health Insurance:** Include Form 1095-A if you enrolled in an insurance plan through the Marketplace.