

## Taxpayer Checklist

(Information you will need before getting your taxes prepared)

### PERSONAL INFORMATION

- Valid Picture ID
- Social Security Card For you and your dependents
- Last Year Tax Return (If Applicable)

### INFORMATION ON YOUR DEPENDENTS

- Date of Birth
- Social Security Numbers
- Childcare Records
- If You Qualify For EITC you will need additional information for your dependents

\*\*\*\*\*Choose At Least One Record That Shows Your Dependent Residency

- School Records
- Daycare Records
- Medical Records
- Lease Agreement

### INCOME

W2's

1099 Misc.

1099 INT

1099 DIV

1099 B

State Income Tax Refund

1099 R (Pension Income)

Unemployment Compensation

Rental Income

Gambling or Lottery Winnings

### EXPENSES

Real Estate Taxes

Mortgage Interest

Employee Business Expenses

Moving Expenses

Tithes and Offering

Charitable Contributions

Student Loan Interest

Private Mortgage Insurance

### EDUCATION EXPENSES

- Form 1098T
- Receipts for Tuition and Books

### SMALL BUSINESS EXPENSES

Advertising

Supplies

Insurance

Repairs and Maintenance

Office Equipment

Legal and Professional Services

Commission

Taxes and License

Misc. Items

(Any Expenses That Are Used to Operate the Use of Your Business)

### HEALTHCARE EXPENSE

1095A

1095B

1095C