

TheTaxPrep

Before you begin to prepare your income tax return, go through the following checklist. Highlight the areas that apply to you, and make sure you have that information available.

Personal Information

- Full Names, social security numbers, date of birth for you, your spouse, your dependents
- Copy of last year's tax returns.

Direct Deposit of Refund

- Bank Account Number and Routing Number

Income

- Forms W-2
- 1099-MISC
- 1099-C forms for cancellation of debt
- 1099-G forms for unemployment income, or state or local tax refunds

Savings and Investments

- 1099-INT, 1099-OID, 1099-DIV - Interest, dividend income
- 1099-B, 1099-S - Income from sales of stock or other property
- Dates of acquisition and records of your cost or other basis in property you sold
- Schedules K-1, income records to verify amounts not reported on 1099s

Retirement Income

- 1099-R Pension/IRA/annuity income
- 1099-SSA, 1099-RRB ,Social security/RRB income (1099-SSA, RRB-1099)

Rental Income

- Rental property income and expenses
- Rental property information (cost, date placed in service, etc.) for depreciation

Other Income

- Gambling income (W-2G or records showing income, as well as expense records)
- Amount of any alimony received and ex-spouse's name
- Health care reimbursements (1099-SA or 1099-LTC)
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Other 1099
- Farming Income

Education Payments

- Form 1098-E for student loan interest paid (or loan statements for student loans)
- Form 1098-T for tuition paid (or receipts/canceled checks for tuition paid for post-high school)
- Scholarships and fellowships
- Bills from the educational institutions
- Anything you paid or received loans for versus what was covered by scholarship or other financial aid

Taxes you paid

- State and local income taxes paid
- Real estate taxes paid
- Personal property taxes
- Vehicle license fees based on value of vehicle

IRA Information

- Records of IRA contributions made during the year
- Traditional IRA basis
- Value of IRAs on Dec. 31, 2013



Other Adjustments to Income

- For teachers: Canceled checks or receipts for expenses paid for classroom supplies, etc.
- Receipts for any qualifying energy-efficient home improvements (solar, windows, etc.)
- Records of Medical Savings Account (MSA) contributions
- Self-employed health insurance payment records
- Records of moving expenses
- Alimony paid
- Keogh, SEP, SIMPLE, and other self-employed pension plans

Itemizing Deductions

- Child care costs: provider's name, address, tax ID, and amount paid
- Adoption costs: SSN of child; records of legal, medical and transportation costs
- Forms 1098: Mortgage interest, private mortgage insurance (PMI), and points you paid
- Investment Related expenses
- Charitable donations: cash amounts, official charity receipts, canceled checks; value of donated property; miles driven and out-of-pocket expenses
- Records of non-cash charitable donations.
- Medical and dental Expenses : Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- Home business expenses, home size/office size, home expenses
- Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel) Job-hunting expenses
- Casualty and theft losses: amount of damage, insurance reimbursements
- Records/amounts of other miscellaneous tax deductions: union dues; unreimbursed employee Expenses (uniforms, supplies, seminars, continuing education, publications, travel, etc.)
- Approximate income of other adults in your home (not spouse, if you're filing jointly)
- Form 8332, copies of your divorce decree, or other documents showing that your ex-spouse is releasing their right to claim a child to you
- HUD statement showing closing date of home purchase
- Amount paid for preparation of your 2012 tax return

Vehicle Information

- Total miles driven for the year (or beginning/ending readings)
- Total business miles driven for the year (other than commuting)
- Amount of parking and tolls paid
- To Claim Actual expenses - receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

If you were affected by a federally declared disaster

- City/county you lived/worked/had property in
- Records to support property losses (appraisal, clean-up costs, etc.)
- Records of rebuilding/repair costs
- Insurance reimbursements/claims to be paid
- FEMA assistance information
- Check [FEMA](#) site to see if my county qualifies for individual assistance