Tax Maxxx

# Tax Prep Checklist

## Personal Information

- ☐ Social Security Number *(everyone)*
- ☐ Driver License *(adults only)*
- ☐ Copy of last year's return
- ☐ DOB *(everyone)*
- ☐ Bank Account Information

## Income/ Investments

- ☐ W-2, 1098, 1099 Forms
- ☐ IRA/ 401K Contributions
- ☐ Stock Investments
- ☐ Loan Statements
- ☐ Other Incomes or Benefits

## Home / Rental Property

- ☐ Mortgage Interest (Form 1098)
- ☐ Energy Efficient Receipts
- ☐ Paid Real Estate Taaxes
- ☐ Insurance Premiums
- ☐ Rental Income/ Taxes Paid
- ☐ Receipts for Repairs, Inspections, etc.
- ☐ Mileage for Repairs, Inspections, etc.
- ☐ Closing Documents *(if you purchased or sold during the year)*

## Own A Business

- ☐ Tax ID
- ☐ Income/ Expenses
- ☐ Capital Assets/ Equipment
- ☐ Mileage Log
- ☐ Health Insurance Premium
- ☐ Business use of home *(if applicable)*

## Health Care

- ☐ Form 1095-B or 1095-C
- ☐ HSA Information
- ☐ Health Insurance Premium
- ☐ Medical/ Dental/ Vision Expenses
- ☐ Medical Equipment

## Other Deductions

- ☐ Child Tax Credit
- ☐ Childcare Expenses
- ☐ Charitable Donations
- ☐ Retirement plan contributions
- ☐ Educational Expenses
- ☐ Moving Expenses
- ☐ Sales tax from vehicle purchase
- ☐ Mileage for Repairs, Inspections, etc.