



TAX PREP CHECKLIST

PERSONAL INFORMATION

- DRIVER LICENSE(S), OR OTHER VALID IDENTIFICATION _____
- SOCIAL SECURITY CARDS _____
- IP PIN, IF APPLICABLE _____
- ROUTING & CHECKING ACCOUNT NUMBERS _____
- COPY OF LAST YEAR'S TAX RETURN _____

DEPENDENT INFO

- SOCIAL SECURITY CARDS _____
- BIRTH CERTIFICATES _____
- CHILDCARE RECORDS _____
- DEPENDENT INCOME, IF APPLICABLE _____

INCOME

- FORMS W-2 _____
- FORMS 1099 _____
- SAVINGS & INVESTMENTS OR DIVIDENDS _____
- RENTAL INCOME _____
- SELF-EMPLOYMENT INCOME _____

CREDITS & DEDUCTIONS

- HEALTH INSURANCE FORM 1095-A _____
- FORMS 1098 _____
- CHILDCARE COSTS _____
- SELF-EMPLOYMENT EXPENSES AND ASSETS _____
- RETIREMENT CONTRIBUTIONS _____
- ESTIMATED TAX PAYMENTS _____
- STATE AND FEDERAL TAXES PAID _____