

Tax Preparation Checklist Individuals

PERSONAL INFORMATION

- Your social security number or tax ID number
- Your spouse's full name, social security number or tax ID number, and date of birth
- Identity Protection PIN, if one has been issued to you, your spouse, or your dependent by the IRS
- Routing and account numbers to receive your refund by direct deposit or pay your balance due if you choose

DEPENDENT INFORMATION

- Dates of birth and social security numbers or tax ID numbers
- Childcare records (including the provider's tax ID number) if applicable
- Income of dependents and of other adults in your home
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

SOURCE OF INCOME

- Forms W-2
- Unemployment or State Refund (1099-G)
- Forms 1099, Schedules K-1, income records to verify amounts not reported on 1099-MISC or 1099-NEC
- Records of all expenses — check registers or credit card statements, and receipts (if 1099 was received)
- Business-use asset information (cost, date placed in service, etc.) for depreciation

SOURCE OF INCOME

- Office in-home information, if applicable
- Record of estimated tax payments made (1040-ES)
- Rental Income
- Retirement Income
- Savings & Investments or Dividends
- Income from sales of stock or other property (1099-B, 1099-S)

TYPE OF DEDUCTIONS

- Home Ownership
- Charitable Donations
- Medical Expenses
- Health Insurance premiums
- Paid Childcare Expenses
- Education Expenses 1098-T

TYPE OF DEDUCTIONS

- K-12 Educator Expenses
- State and Local Taxes Retirement & Other Savings Federally
- Declared Disaster

OTHER INFORMATION

- Foreign bank account information: Location, bank institutions name, account number, the peak value of the account during the year
- Foreign tax paid
- Foreign Income

OTHER INFORMATION

- Marketplace Health Insurance Form (1095-A)