PERSONAL TAX *checklist*

CASEY • PETERSON

Before you meet with your tax professional, make sure to gather up all of your necessary financial documents. Use our handy checklist to get started.

PERSONAL INFORMATION & INCOME

- **FOR YOU, YOUR SPOUSE, AND ANYONE ELSE ON YOUR RETURN**
  Full legal names, dates of birth, Social Security numbers, drivers license numbers, and last year's tax return
- **PERSONAL INCOME STATEMENTS**
  W-2 (for you and your spouse) and 1099-MISC for each job (if self-employed)
- **SOCIAL SECURITY/RRB INCOME**
  SSA-1099 and RRB-1099
- **PENSION/IRA/ANNUITY**
  Form 1099-R
- **INVESTMENT OR INTEREST INCOME**
  1099-INT, 1099-DIV, 1099-B, and Schedule K-1
- **TRUST AND ESTATE BENEFICIARY EARNINGS**
  Form 1041, Schedule K-1
- **HOME OR PROPERTY SALE**
  Form 1099-S
- **UNEMPLOYMENT INCOME OR STATE OR LOCAL REFUNDS**
  Form 1099-G
- **HSA AND LONG-TERM CARE REIMBURSEMENTS**
  Forms 5498-SA (contribution tax document) and 1099-SA (distribution tax document)

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COMMON DEDUCTIONS

The standard deduction has doubled to $12,200 for singles and $24,400 for joint filers. So, you may not need to itemize anymore. But if you do, here are the most common deductions.

○ YES ○ NO

CHARITABLE CONTRIBUTIONS

Detailed list of donations, receipts for contributions over $250, and Form 1098-C for vehicle donations (or a letter confirming donation)

○ YES ○ NO

CHILD AND DEPENDENT CARE EXPENSES

Name, address, and tax ID or Social Security number of the provider

○ YES ○ NO

EDUCATION EXPENSES

Tuition statements, itemized receipts of qualified educational expenses (Form 1098-T), and student loan interest statements (Form 1098-E)

○ YES ○ NO

HEALTH CARE EXPENSES

Records of expenses

○ YES ○ NO

HEALTH SAVINGS ACCOUNT CONTRIBUTIONS

Form 5498-SA

○ YES ○ NO

HOMEOWNER EXPENSES

Mortgage interest statements (Form 1098), property tax payment receipts, and energy-efficiency upgrade receipts (Form 5695 if provided by installer)

○ YES ○ NO

IRA CONTRIBUTIONS

Form 5498

○ YES ○ NO

JOB-RELATED EDUCATIONAL EXPENSES

Records of expenses

○ YES ○ NO

SELF-EMPLOYMENT EXPENSES

Records of business/home office expenses, assets, pension plan contribution, health insurance payments, and estimated tax payment receipts (state and federal)