



Tax Prep Checklist: Everything You Need to Save Time & Money on Your Return

Nearly 64 million people self-prepared their taxes this year. The key to doing your tax return easily and stress-free is to gather the items you need before starting and to use a tax software program. Being organized makes it easier to take advantage of money-saving credits and deductions so you get the biggest possible refund. Here's a checklist of everything you may need to do your taxes.

Personal information

- Social security numbers and birth dates for you, your spouse and your dependents
- A copy of last year's tax return
- Routing number and account number to receive your refund via direct deposit

Income

- W-2 forms for you and your spouse
- 1099-C forms for cancellation of debt
- 1099-G forms for unemployment income, or state or local tax refunds
- 1099-INT, 1099-DIV, 1099-B forms for investment or interest income

- 1099-MISC forms for independent contractor income
- 1099-R forms for distributions from IRAs or retirement plans
- 1099-S forms for sale of property income
- SSA-1099 for Social Security income
- Alimony received, paid
- Income and expense from a business
- Income and expense from rental property
- Miscellaneous income: jury duty, gambling/lottery winnings, scholarships, Medical Savings Account (MSA), unreported tip income, prizes and awards

Expenses

- Forms 1098 for mortgage interest, points and private mortgage insurance
- Form 1098-E for student loan interest
- Form 1098-T for tuition paid
- Federal and State estimated tax payments
- Medical and dental expenses (including medical mileage, long term care health insurance)
- Real estate and personal property taxes
- State and local taxes
- CASH and NON-CASH charitable donations (including mileage driven)
- Casualty and theft loss (only for federally declared disasters)
- Gambling losses to the extent of winnings
- Childcare costs including care provider identification
- IRA contributions
- Qualifying energy expense for home improvements
- Receipts for classroom supplies (educators in grades K-12 only)
- Receipts for moving expenses (members of the military only)

Other

- Form 1095-A, Health Insurance Marketplace Statement
- 1095-B, 1095-C Health Insurance Verification Form