

TAX FILING CHECK LIST

Below is a list of items that you will need to get together in preparation to file your annual taxes:

- Personal information for all people being included on the tax return, including social security numbers
- Direct deposit account information
- W-2s for wages
- 1099s for small business or subcontractor income
- Alimony amount received
- Partnership or trust income
- 1099s for interest or dividends received
- Information on last year's state tax refund
- Information on sales of stocks
- Jury duty payment
- Gambling or lottery winnings
- Alimony paid
- Adoption expenses
- Job hunting expenses
- Retirement account contributions
- Education costs for college or graduate school
- Medical expenses, including health insurance paid
- Items related to your home: mortgage interest and property taxes
- Charitable contributions
- Child care expense details (provider, tax identification number, total paid)
- State or federal estimated taxes paid last year
- Information about energy saving purchases such as hybrid vehicles or energy saving upgrades to your home
- Small Business - Information on your income and expenses if you will be filing Schedule C
- Rental Properties - Information