

## Basic Tax Return Preparation Checklist

Use the checklist below to gather your tax documents. This is a list of basic documents to get you started. Individual circumstances might require additional documents.

### Personal Information:

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- Name, address, Social Security numbers, date of birth for you, your spouse, and your dependents
- Copy of last year tax return (if our firm didn't prepare 2021 tax return).
- Identity Protection PIN, if one has been issued to you, your spouse, or your dependent by the IRS
- Bank account number and routing number for direct deposit of tax refund

### Information about your income:

- W-2 for you and your spouse
- Form 1099-Misc or 1099-NEC for other income
- Schedule K-1s from any businesses
- Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-S)
- Transactions involving cryptocurrency (Virtual currency)
- Pension/IRA/annuity income (1099-R)
- Form 1099-G for Unemployment income
- Info on any other income for example royalty income, prizes and awards

### Information about deductions:

- Form 1098 for mortgage interest
- Form 1098-E for student loan interest
- Form 1098-T for education expenses
- Form 1095-A for health insurance through the Marketplace
- Self-employed health insurance payments record (only applies if you are self-employed)
- Child Care costs (provider's name, address, tax ID, and amount paid)
- Rental property asset information along with records of income and expenses
- Qualified charitable contributions

### Taxes you've paid:

- Real estate taxes paid
- Estimated tax payments made