What To Bring For Your Tax Appointment

Getting organized to prepare for your tax appointment can save you a ton of time, and is well worth the effort.

Tax Preparation Checklist

If it's just after tax season, this list will help you know what documents to keep an eye out for throughout the year and set aside. If your tax appointment is right around the corner, this list is a great resource to help you track down the right documents.

With all of the changes every year (and, of course, that's especially true THIS year), filing your taxes on your own is not for the faint of heart. That's even with nice-looking softwares on the market which purport to make it easy for you.

But that's what we're here for.

Below is a list of what you will need during the tax preparation process. Not all of them will apply to you — probably MOST will not. Nonetheless, it's a useful tax preparation checklist. Feel free to even print it out and keep a copy in your filing cabinet

Before you get overwhelmed: yes, this is a long list — but it's the unfortunate reality of our tax code that it's not even comprehensive! But these items will cover 95% of our clients. Really, this is for ensuring that we're able to help you keep **every dollar** you can keep under our tax code.

Even if for some strange reason you won't be using our cost-effective services this year, feel free to use this list as a handy guide…

Tax Preparation Checklist

Personal Data

- Social Security Numbers (including spouse and children)
- Child care provider tax I.D. or Social Security Number

Employment & Income Data

- W-2 forms for this year
- Tax refunds and unemployment compensation: Form 1099-G
- Miscellaneous income including rent: Form 1099-MISC
- Partnership and trust income
- Pensions and annuities
- Alimony received
- Jury duty pay
- Gambling and lottery winnings
- Prizes and awards
- Scholarships and fellowships
- State and local income tax refunds
- Unemployment compensation

Health Insurance Information:

- * All 1095-A Forms from marketplace providers (if you purchased insurance through a Marketplace)
- * Existing plan information (policy numbers, etc.)
- * If claiming an exemption, your unique Exemption Certificate Number
- * Records of credits and/or advance payments received from the Premium Tax Credit (if claiming)

Homeowner/Renter Data

- Residential address(es) for this year
- Mortgage interest: Form 1098
- Sale of your home or other real estate: Form 1099-S
- Second mortgage interest paid
- Real estate taxes paid
- Rent paid during tax year
- Moving expenses

Financial Assets

- Interest income statements: Form 1099-INT & 1099-OID
- Dividend income statements: Form 1099-DIV
- Proceeds from broker transactions: Form 1099-B
- Retirement plan distribution: Form 1099-R
- Capital gains or losses

Financial Liabilities

- Auto loans and leases (account numbers and car value) if vehicle used for business
- Student loan interest paid
- Early withdrawal penalties on CDs and other fixed time deposits

Automobiles

- Personal property tax information
- Department of Motor Vehicles fees

Expenses

- Gifts to charity (receipts for any single donations of $250 or more)
- Unreimbursed expenses related to volunteer work
- Unreimbursed expenses related to your job (travel expenses, entertainment, uniforms, union dues, subscriptions)
- Investment expenses
- Job-hunting expenses
- Education expenses (tuition and fees)
- Child care expenses
- Medical Savings Accounts
- Adoption expenses
- Alimony paid
- Tax return preparation expenses and fees

Self-Employment Data

- Estimated tax vouchers for the current year
- Self-employment tax
- Self-employment SEP plans
- Self-employed health insurance
- K-1s on all partnerships
- Receipts or documentation for business-related expenses
- Farm income

Deduction Documents

- State and local income taxes
- IRA, Keogh and other retirement plan contributions
- Medical expenses
- Casualty or theft losses
- Other miscellaneous deductions