

# The Individual Tax Prep Checklist You've Been Waiting For

Taxes are complicated. With over 70,000 pages in our U.S. tax code, it can be difficult to figure out what you need to report to stay compliant with the IRS. This personal tax prep checklist is a great starting point to help you tackle your taxes. Here's what you'll need:

## Personal information

Social Security numbers/tax ID numbers for you, your spouse, & your dependents

Copy of last year's tax return (optional)

Bank account number & routing number (only needed if you're depositing your refund directly)

## State & local taxes or sales tax

Amount paid for state/local income tax or state/local sales tax

Invoice of vehicle sales tax paid

## Homeowner/Renter info

Residential address(es) for the year

Mortgage interest: 1098 form

Real estate & personal property tax records

Receipts for energy-saving tax records

Income from sale of a property: 1099-S forms

Rent paid during tax year

Real estate taxes paid

Second mortgage interest paid

## General income

Employment income: W-2 forms (if employed) for both you & your spouse

Unemployment income or state/local tax refunds: 1099-G form

Independent contractor work income: 1099-MISC

### If self-employed:

Depreciation Schedule

Records of all expenses (include vehicle expenses and mileage information)

Record of estimated tax payments made

Home office information

Alimony received

Jury duty pay

Gambling and lottery winnings: Form W-2G

Prizes & awards

Scholarships & fellowships

Partnership, S corp, & trust income: K-1 Forms

Pensions & annuities

Rental income

Any other 1099 income (1099-C form, etc.)

## Medical expense & health insurance

Medical & dental expense records

Health insurance

### For health insurance:

Enrollment in insurance plan through the Marketplace: Form 1095-A

Proof of insurance coverage through another source (e.g., employer, insurance company, etc.): Form 1095-B and/or 1095-C

Marketplace exemption certificate if you received an exemption from the Marketplace

## Education expenses

Tuition paid: Form 1098-T

Student loan interest paid: Form 1098-E

Receipts for qualified educational expenses

Records of scholarships or fellowships

## Childcare expenses

Amount paid to licensed day care center/family day care

Amount paid to babysitter

Name, address, & tax ID for each childcare provider

## Retirement expenses

Payments/Distributions from IRS or retirement plans: 1099-R

Social Security/RRB income: 1099-SSA, RRB-1099 forms

IRA contributions: Form 5498

HSA contributions: Form 5498-SA

Any other 5498 series forms

## Charitable donations

Amounts donated to schools, houses of worship, and other charitable organizations and records of donations

*Proof must be given if the amount donated is equal to or above \$500.*

Miles driven for charitable or medical purposes

## Alimony paid

Social Security number for person receiving alimony

Name of person receiving alimony

Copy of order

## Federally declared disaster

Where you lived (city/county)

FEMA assistance information

Insurance reimbursement/claims

Records of rebuilding/repair costs

Records to show property losses (clean-up costs, appraisals, etc.)

## Tax preparation

Amount paid for last year's tax return prep

Need more help with  
your taxes?

Our tax professionals  
are here to help.

[www.moneysolver.org](http://www.moneysolver.org)



MoneySolver™