Tax Preparation Checklist

If you have any questions, please do not hesitate to call our office at (843) 261-9293 Summerville (843) 797-5153 Goose Creek

- ☐ Full legal name, DOB and SSN or Tax ID Number for you, your spouse/partner and your dependents.
- ☐ Prior year tax return.
- ☐ Bank account number and routing number, if depositing your refund directly into your account.

Deduction & Other Expense Records

- ☐ Itemized Deductions (Medical Expenses, Mortgage Interest, Taxes Paid, Charitable Contributions)
- ☐ Education Expenses: 1098-T (tuition statement and itemized receipts of qualified educational expenses); 1098-E Form (student loan interest statement)
- ☐ Self-Employment Deductions
- ☐ Child and Dependent Care Expenses: Name, address, and Tax ID or SSN of the provider
- ☐ Alimony Expenses: Provide ex-spouse's full name and SSN
- ☐ Rental Deductions
- ☐ Teacher/Educator Expenses (up to $250)
- ☐ IRA Contributions (Form 5498)
- ☐ Health Savings Account contributions (Form 5498-SA)

Employment, Income, and Investment Records

- ☐ W-2s for each job held during the tax year (by you, your spouse and any dependents)
- ☐ Records for any/all other income collected during the tax year, which could include:
  - Alimony received
  - Investment or interest income statements (1099-INT, -DIV, -OID, -B, or K-1)
  - 1099-C forms for cancellation of debt
  - Self-employment income (1099-MISC)
  - Rental Income
  - Pension/IRA/annuity income (1099-R)
  - Social Security/RRB income (1099-R), ASSA-1099
  - Income from sale of home or property (1099-S)
  - Unemployment compensation and state tax refunds (1099-G)
  - HSA and long-term care reimbursements (1099-SA or -LTC)
  - Trust and estate beneficiary earnings (Form 1041)
  - Other income: jury duty compensation, gambling and lottery winnings, scholarships, fellowships