



PITTMAN P.C.

Tax Preparation Checklist

Personal Information:

- Tax payer and spouse full legal name, date of birth and social security number.
- Dependent(s) full legal name, date of birth and social security number, and months resided with taxpayer.
- Home address and county of residence.
- Form 8332 executed by custodial parent.

Incomes:

- W-2s for each employer.
- W-2G for gambling winnings
- 1099s for all income reported to the IRS: Dividend income (1099-DIV), Interest income (1099-INT), Miscellaneous income (1099-MISC), Retirement (1099-R), sale of home or real estate (1099-S), Unemployment compensation or State Tax Refund (1099-G).
- Rental income.

Deductions:

- 1098-S Mortgage Interest and Real Estate Taxes on a residence or rental properties.
- 1098-T Education Expenses: scholarships, itemized receipts of qualified educational expenses.
- Child & Dependent Care Expenses: name, address, Tax ID or Social Security Number of the child care provider and amount paid.
- Business Expenses for self-employed individuals.
- Charitable Contributions: detailed list of donations, date of contributions and receipts.
- Vehicle excise and sales tax paid.
- Moving expenses.
- Alimony expenses: ex-spouse's full name and social security number.
- Medical expenses: insurance premiums, doctor, dentist, eye care, and prescriptions.
- Health Savings Account contributions (Form 1099-SA) and distributions (Form 5498-SA).
- Energy saving home improvement receipts.
- Casualty and theft losses.
- Last year tax preparation fees.
- Rental expenses.
- Student loan interest

Other:

- Bank account and routing numbers for direct deposit of your refund.
- Record of Estimated Tax Payments made detailing amount and date paid.
- First-time home buyer closing package.
- Last year's tax return.
- 1095-A if you received credit from the healthcare.gov marketplace.