

# Individual Tax Prep Checklist

## Personal Information

- You (and your spouse's) Social Security Card and State issued ID
- Dependent(s) Social Security card and D.O.B
- Copy of last year's tax return
- IRS Notice 1444 (stimulus payment information if available)
- Form 1095-A (if had insurance through the Marketplace)

## Income

- W-2 Forms
- 1099-NEC Independent contractor work
- 1099-G Unemployment or state/local tax refunds
- 1099-R Retirement plan distributions
- 1099-C Cancellation of debt
- 1099-S Sale of property
- 1099-INT Interest Income
- 1099-DIV Dividend Income
- 1099-B Sale of stocks or cryptocurrency
- SSA-1099 Social Security Benefits
- Alimony received (also need payer's name and SSN)
- Miscellaneous income (Jury Duty, Gambling, etc...)

## Deductions

- 1098-E Student loan interest paid
- 1098-T Student tuition paid
- Teacher's out of pocket receipts for classroom supplies
- IRA contributions
- Energy home improvement receipts
- Alimony paid (also need payee's name and SSN)
- Childcare Expenses
- Charitable contribution receipts
- Itemized deductions if sum is over standard deduction

### Standard deductions

- Single or married filing separate \$12,400
- Married filing jointly or qualifying widow(er) \$24,800
- Head of Household \$18,650
- Medical and Dental expense records including mileage
- Sales Tax on large purchases (automobile, RV, boat, etc..)
- Real estate taxes
- Form 1098 Mortgage interest
- Cash charitable contribution receipt
- Non-cash charitable contribution receipts