**HOW TO GET READY FOR TAX SEASON**

**TAX APPOINTMENT CHECKLIST**

Your prior year tax return – **PRE-REQUISITE**

Government Issued ID – **PRE-REQUISITE** (if address on ID has changed, provide recent utility bill)

Your social security number or ITIN – **PRE-REQUISITE**

Spouse’s social security number or ITIN – **PRE-REQUISITE**

Childcare information (Name, address, tax ID, amount paid)

Unemployment on Form 1099-G

Form W-2 from your employer

Records of all income reported on 1099s (1099-NEC), 1099-K, 1099-MISC)

Rideshare driver’s annual summary

Self-employed health insurance

Records of all business-related expenses

Keogh, SEP, Simple, and other self-employed plan contributions

Receipts for business equipment

Receipts for car expenses

Home office expense

Record of estimated tax payments made (1040-ES)

S-Corp, Partnership and Trusts Schedule K-1

Rental income (could be reported on 1099-MISC)

Rental property expenses (mortgage interest, property taxes, supplies, repairs, etc.)

Rental property purchase information (Purchase price, date of purchase, etc.)

Interest and Dividend income on Form 1099-INT, Form 1099-DIV, Form 1099-OID

Stocks, cryptocurrency, mutual funds, bonds reported on 1099-B

Dates and costs of property sold if not on 1099-B

Losses from stock sales carried over from the previous year

Income reported from sales of other property reported on Form 1099-S, 1099-B

Expenses related to investments

Retirement income Form 1099-R

Social Security income Form SSA-1099, RRB-1099

HAS’s, MSAs reported on Form 1099-SA

Home sales Form 1099-S

Canceled debt Form 1099-A, Form 1099-C

Alimony received (only for divorce or separation agreements before Jan. 1, 2019)

Gambling winnings on Form W2-G

Form 1098-T

Mortgage interest and refinancing

Form 1098 from mortgage company (you may have multiple if mortgage was sold)

Property tax bill

Settlement statement if you purchased a new home or refinanced

Points paid (Found on Form 1098)

State and local income taxes paid (this excludes state tax withholding)

Personal property taxes (if property taxes are not included on Form 1098)

Casualty loss receipts

Vehicle sales tax

Receipts for charitable donations (including mileage to drive to volunteer)

Medial and dental expenses (including mileage to drive to doctor’s appointments)

Form 1098-E student loan interest

IRA contributions reported on Form 5498

Teachers Education Expenses

HSA, MSA contributions reported on Form 5498-SA

Moving expenses (For active-duty military only)

Alimony Paid (only for divorce or separation agreements before January 1, 2019)

Non-business bad debt (deductible up to $3000)

Receipts for home energy-efficient equipment

Electric vehicle purchase

Health insurance through the Health Insurance Marketplace Form 1095-A