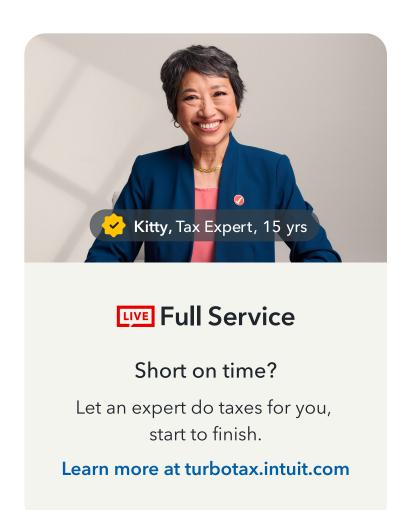


Tax Preparation Checklist

Before you begin your tax filing, you may want to review the following checklist. Highlight the areas that apply to you, and make sure you have that information available. Better yet, attach the list to a folder of your tax documents, and check items off as you add them to the folder. You may need other documents and information, depending on your situation.



You will need (if applicable):

Personal Information				
	Social Security numbers for you, your spouse, and any dependents Dates of birth for you, your spouse, and any dependents Income of any dependents			
Inc	Income for the tax year			
Wa	ges, tips, and other compensation from employment			
	W-2 forms			
	Tips and household employee wages not reported on W-2 forms			
Reti	Retirement income			
	1099-R forms for distributions from retirement plans (like IRAs), pensions, and annuities SSA-1099 and RRB-1099 forms for Social Security and Railroad Retirement Board benefits			
Self	Self-employment income (Schedule C)			
	1099-NEC forms for non-employee compensation			
	1099-K forms from a payment processor or online marketplace			
	Sales records			
	Profit and loss statements			
	Expense receipts and records, including for the business use of your home or vehicle, and cost of goods sold			
Rental income				
	1099-MISC forms showing rent payments received			
	Rents received but not reported on 1099-MISC forms			
	Number of days property is rented			

Income for the tax year (cont.)			
	Receipts and other records for expenses		
	Depreciation schedules		
Real estate sales income			
	1099-S forms for proceeds from sale of real estate		
	Escrow closing statements		
	Basis information for property sold		
Farr	m income (Schedule F)		
	1099-G forms for government payments		
	1099-PATR forms for distributions from cooperatives		
	1099-MISC forms for pasture rental income, crop insurance proceeds, or other miscellaneous income		
Oth	er common forms of income		
	Alimony received for divorce finalized before 2019 (records of alimony payments)		
	Business income from S corporations, partnerships, and LLCs (Schedule K-1 forms)		
	Gambling winnings (W-2G forms)		
	Prizes or awards (records showing amount or value)		
	Refund of state or local income tax (1099-G forms)		
	Scholarships in certain cases (records showing scholarship's purpose and use)		
	Stock options (dates, stock value, and other related information)		
	Unemployment compensation (1099-G forms)		
Tax	deductions		
Alin	nony deduction (only if divorce finalized before 2019)		
	Amount of alimony paid		
	Ex-spouse's Social Security number		
Cha	ritable gifts deduction		
	Receipts, bank or credit card statement, or other records for cash donations		
	For gifts of \$250 or more, a written acknowledgment from donee		
	1098-C forms for contributions of motor vehicles, boats, and airplanes		
	Appraisals for donated property over \$5,000 (\$500 for clothing and household items)		
	Mileage for use of your motor vehicle for volunteer work		

Tax	deductions (cont.)
Me	dical and dental expense deduction
	Receipts and other records for unreimbursed medical or dental expenses Out-of-pocket health and dental insurance premiums, including for Medicare and long-term care insurance Mileage for use of your motor vehicle for medical reasons
	Lodging expenses while traveling for medical care
Mo	rtgage interest and points deduction
	1098 forms
	Home mortgage interest or points not reported on 1098 forms
Stat	te and local taxes (SALT) deduction
	Estimated state and local income tax payments Sales tax payment records if you're deducting sales taxes instead of income taxes Real estate tax payment records, including escrow closing statements Personal property tax payment records, including for vehicle license fees
Stu	dent loan interest deduction
	1098-E forms or loan statements if 1098-E form not received Loan origination fee or capitalized interest records (for loans made before September 1, 2004)
Oth	ner common tax deductions
	Archer medical spending account (MSA) deduction (5498-SA forms) Disaster/casualty and theft loss deduction (records showing amount of loss, basis and value of damaged or stolen property, insurance reimbursements)
	Gambling losses (receipts, raffle tickets, and other gambling records)
	Health savings account (HSA) deduction (5498-SA forms)
	Investment interest expense deduction (records for loans to buy investment property) Moving expense deduction for military personnel (records showing deductible moving expenses Self-employed health insurance deduction (premium payment records, Form 1095-A)
Tax	credits
Add	option credit
	Receipts for qualified adoption expenses, including for legal, medical, and transportation costs Employer reimbursements of adoption expenses (if any)
Chi	ld and dependent care credit
	Amount paid for care Care provider's name, address, and taxpayer identification number

Tax credits (cont.)			
Clean vehicle credit (for purchase of electric, plug-in hybrid electric, or fuel cell vehicle)			
Time-of-sale report from dealer (also called a "seller report")			
MSRP (manufacturer's suggested retail price), if you buy a new vehicle			
Education tax credits (American Opportunity and Lifetime Learning Credits)			
☐ 1098-T forms			
Records for qualified educational expenses not included on 1098-T forms			
Home Energy Credits (Energy-Efficient Home Improvement and Residential Clean Energy Credits)			
Receipts and records for qualified energy-saving upgrades and the installation of qualified clean energy systems in your home			
Kilowatt capacity of fuel cell systems (if applicable)			
Premium tax credit			
☐ 1095-A forms			
Retirement savings contributions credit (Saver's Credit)			
Amounts contributed to eligible retirement accounts and ABLE accounts			
Taxes you've paid			
Estimated or other tax payments for the tax year (including tax paid with <u>extension</u>)			
Prior-year refunds applied to the current tax year			
Other information			
Bank account and routing numbers for direct deposit or tax payments			
Foreign bank account information (if a Report of Foreign Bank and Financial Accounts is required)			
Last year's tax return for general reference and e-filing			
Driver's license for e-filing (optional for additional security)			

The above article is intended to provide generalized financial information designed to educate a broad segment of the public; it does not give personalized tax, investment, legal or other business and professional advice. Before taking any action, you should always seek the assistance of a professional who knows your particular situation for advice on your taxes, your investments, the law or any other business and professional matters that affect you and/or your business.

Maximize your return, minimize your effort.

Our tax experts ensure every detail is accurate, so you don't leave a dollar behind.