

What Info Do I Need to Turn in to Get My Taxes Done?

Tax Return Checklist

Personal Information

- Your social security number or tax ID number
- Your spouse's full name and social security number or tax ID number
- Amount of any alimony paid and ex-spouse's full name and social security number
- Your tax returns for the previous three years. Your Tax Professional can check them for accuracy

Information About Other People Who May Belong on Your Return

- Dates of birth and social security numbers or tax ID numbers
- Childcare records (including the provider's tax ID number) if applicable
- Income of other adults in your home
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

Education Payments

- Forms 1098-T from educational institutions
- Receipts that itemize qualified educational expenses
- Records of any scholarships or fellowships you received
- Form 1098-E if you paid student loan interest

Employee Information

- Forms W-2

Self-Employment Information

- Forms 1099-NEC and 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s
- Records of all expenses — check registers or credit card statements, and receipts
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Office in home information, if applicable

Business Use of Vehicle Information for Self Employed Folks:

- ❑ Log showing total miles driven for the year (or beginning/ending odometer readings), total business miles driven for the year (other than commuting), and the business purpose of the mileage
- ❑ Amount of parking and tolls paid
- ❑ If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

Rental Property Income

- ❑ Records of income and expenses
- ❑ Rental asset information (cost, date placed in service, etc.) for depreciation

Retirement Income and Contributions

- ❑ Pension/IRA/annuity income (1099-R)
- ❑ Social security/RRB income (1099-SSA, RRB-1099)
 - Form 5498 showing IRA contributions
 - Traditional IRA basis (i.e. amounts you contributed to the IRA that were already taxed)

Savings and Investments

- ❑ Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- ❑ Income from sales of stock or other property (1099-B, 1099-S)
- ❑ Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)

Other Income

- ❑ Unemployment, state tax refund (1099-G)
- ❑ Gambling income (W-2G or records showing income, as well as expense records)
- ❑ Amount of any alimony received
- ❑ Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- ❑ Jury duty records
- ❑ Prizes and awards
- ❑ Other 1099's

Healthcare / Affordable Care Act

- ❑ Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)

Other:

- Form 5498-SA showing HSA contributions
- All other 5498 series forms (5498-QA, 5498-ESA)
- Forms 1098 or other mortgage interest statements
- All other 1098 series forms
- Amount of state/local Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Real estate and personal property tax records
- Invoice showing amount of vehicle sales tax paid
- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- Amounts of miles driven for charitable or medical purposes
- Expenses related to your investments
- Amount paid for preparation of last year's tax return
- Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
- Job-hunting expenses
- Receipts for energy-saving home improvements
- Record of estimated tax payments made

If you were affected by a federally declared disaster

- City/county you lived/worked/had property in
- Records to support property losses (appraisal, clean-up costs, etc.)
- Records of rebuilding/repair costs
- Insurance reimbursements/claims to be paid
- FEMA assistance information

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