

Tax Prep Checklist



- 2022 Federal & State (if applicable) Tax Return**
- Social Security cards (or numbers) for yourself, spouse and all dependents on return**
- Bank Account information (name, routing and account numbers)**
- Stimulus Check Payout amounts**
- W-2 Forms: Employers must issue these by Jan 31st.**
- SSA-1099 or RRB: Social Security or Railroad benefit payment forms**
- 1099-R retirement forms**
- 1098 forms: These may apply depending on your circumstances**
 - 1098 Mortgage Interest
 - 1098T Tuition paid
 - 1098E Student Loan Interest
- 1099 forms: These may apply depending on your circumstances**
 - 1099-NEC: for freelance/independent contractor work
 - 1099-K: Third party transactions/payments like PayPal
 - 1099-G: Government payments like unemployment or state refunds
 - 1099-Int: Interest payments
 - 1099-Div: Dividend payments
 - 1099-B: Brokerage transactions
- Record of taxes paid during the year, including estimated quarterly taxes**
- Info about foreign bank accounts**
- Info about cryptocurrency accounts and transactions**
- Form 1095-A if using Healthcare.gov**
- Record of distributions from or loans against retirement plans**
- Record of contributions to HSA, IRA, 401K, Roth IRA, ESA and/or 529 plans**
- Rental property income and expenses**
- Child care expenses: Provider name, address, tax ID and total paid**
- Adoption costs: All travel, medical, legal expenses and child's name, DOB and SSN**
- Itemized deductions: Dental, medical, charitable, state and local taxes, property taxes and mortgage interest**