

# Tax Return checklist

## Personal

- Social Security Numbers
- Driver's License
- DOB
- Address Change
- Dependents DOB & SS #
- Last 2 years Tax Returns

## Income

- W2's
- 1099's in all forms

## Home & Rental Properties

- 1098: Mortgage Interest
- Paid Real Estate Taxes
- Insurance Premiums
- Rental Income
- Rental Expenses
- Mileage & Receipts for Rental Repairs

## Self - Employed

- 1099's
- Tax ID
- Mileage Log
- List of Assets and Purchase Dates
- Business Expenses
- Taxes Paid

## Child Care

- Child Care Expenses
- Tuition Forms
- Qualified Tuition Expenses (Books)
- Student Loan Interest

## Itemized Deductions

- Medical Expenses
- Charitable Contributions
- Sales Tax Paid

## Other Miscellaneous

- Buy/Sale Home
- Farm Income & Expenses
- Educator Expenses
- IRA Contributions

