



## TAXPAYER CHECKLIST

(Information you will need before getting your taxes prepared)

### **PERSONAL INFORMATION:**

Valid picture ID  
Social Security Card for you and your dependents  
Last year Tax Return (if applicable)

### **INFORMATION ON YOUR DEPENDENTS:**

Date of birth  
Social Security Numbers  
Childcare records  
If you qualify for EITC you will need additional information for your dependents

- Choose at least one record that shows your dependent residency:
  - School records
  - Daycare records
  - Medical records
  - Lease Agreement

### **INCOME:**

W2	State Income Tax Refund
1099 Misc.	1099 R (Pension Income)
1099 NT	Unemployment Compensation
1099 DIV	Rental Income
1099 B	Gambling or Lottery Insurance

### **EXPENSES:**

Real Estate	Taxes Tithes and Offering
Mortgage Interest	Charitable Contributions
Employee Business Expenses	Student Loan Interest
Moving Expenses	Private Mortgage Interest

### **EDUCATION EXPENSES:**

Form 1098T  
Receipts for tuition and books

### **SMALL BUSINESS EXPENSES:**

*(Any expenses that are used to operate the use of your business)*

Advertising	Repairs and Maintenance	Commission
Supplies	Office Equipment	Taxes & License
Insurance	Legal and Professional Services	Misc. Items

### **HEALTHCARE:**

1095 A      1095 B      1095 C