



Tax Prep Checklist

(Not All Inclusive)

MOST COMMON

- Current Government Issued ID
- Dependent Birth Certificate
- Dependent Soc Sec Card
- W-2
- 1099-R
- 1099-SSA
- 1099-G
- 1099-B
- 1095-A
- 1098-Mortgage Int
- CA 3895 Health Insurance Stmt.
- 1098-Tuition Statement
- Childcare Costs, Provider Address, EIN
- Medical Costs
- Out of Pocket College Expenses
- Union Dues, Uniforms, Job Expenses
- Stimulus Payment Received
- Vehicle Registration

BUSINESS

- 1099-K
- 1099-Misc
- Assets Purchase Date & Cost
- Supplies
- Telephone
- Home Office (All home expenses)
- Wages & Payroll Taxes
- Merchant Service Fees
- Interest on Business Credit Cards
- K-1
- Meals & Entertainment
- Outside Contractor Payments
- Advertising & Website
- Vehicle Mileage for Business

RENTAL PROPERTY

- 1099-Misc
- Advertising
- Cleaning & Maintenance
- Gardener
- Insurance
- Legal & Professional
- Management
- Mortgage Interest
- Pest Control
- Property Taxes
- Repairs
- Supplies
- Travel
- Utilities