**Income Tax Preparation Checklist**

**List of Tax Preparation Forms, Documents**

[Taxable Income Forms, Documents](https://www.efile.com/tax-declarations-statements-forms/#c-forms)

An overview of[taxable](https://www.efile.com/taxable-income/) and [non-taxable income](https://www.efile.com/tax-savings/tax-free-income/)

* \_\_\_ [W-2 Form](https://www.efile.com/irs-federal-income-1040-tax-forms/#form-w2)(s) for Wages, Salaries, and Tips
* \_\_\_ Interest Income Statements: Form [1099-INT](https://www.efile.com/irs-federal-income-1040-tax-forms/#1099-INT) & 1099-OID
* \_\_\_ [Dividend Income](https://www.efile.com/ordinary-qualified-dividends-tax-rates-stock-income/) Statements: Form 1099-DIV
* \_\_\_ Sales of Stock, Land, etc. for [Capital Gains](https://www.efile.com/capital-gains-tax-rates-investment-income-loss-deduction/): Form 1099-B
* \_\_\_ Sales of Real Estate: Form 1099-S
* \_\_\_ [State Tax](https://www.efile.com/state-income-tax-returns/) Refunds: [Form 1099-G](https://www.efile.com/irs-federal-income-1040-tax-forms/#1099-G)
* \_\_\_ [Alimony](https://www.efile.com/alimony-payments-and-taxes/) Received or Paid
* \_\_\_ [Unemployment Compensation](https://www.efile.com/unemployment-benefits-and-income-taxes/) Received
* \_\_\_ Miscellaneous Income: [Form 1099-MISC](https://www.efile.com/form-1099/)
* \_\_\_ [Retirement Income](https://www.efile.com/retirement-planning-and-tax-deductions/): [Form 1099-R](https://www.efile.com/irs-federal-income-1040-tax-forms/#1099-R)
* \_\_\_ [Social Security Income](https://www.efile.com/social-security-taxable-income-tax-benefits/) and Railroad Retirement Income: Form SSA-
* 1099
* \_\_\_ [Business Income](https://www.efile.com/self-employed-independent-contractor-income-estimated-taxes/) and Expenses
* \_\_\_ Rental Income and Expenses
* \_\_\_ Farm Income and Expenses
* \_\_\_ Form K-1 Income from Partnerships, Trusts, and S-Corporations
* \_\_\_ [Tax Deductible Miles Traveled](https://www.efile.com/tax-deduction/mileage-rates/) for Business Purposes

[Tax Credits](https://www.efile.com/tax-credits/)

* \_\_\_ [Child Tax Credit](https://www.efile.com/do-i-qualify-for-the-child-tax-credit-who-is-eligible/)
* \_\_\_ Child Care Provider Address, I.D. Number and Amounts Paid
* \_\_\_ [Earned Income Tax Credit (EITC)](https://www.efile.com/tax-credit/earned-income-credit/)
* \_\_\_ [Adoption](https://www.efile.com/tax-deduction/income-deduction/child-tax/#adoption_credit) Expense Information for the Adoption Credit
* \_\_\_ [Foreign Taxes](https://www.efile.com/foreign-earned-income-and-income-exclusion/) paid
* \_\_\_ [First Time Home Buyer Tax Credit](https://www.efile.com/tax-deduction/mortgage-deduction/first-time-home-buyer-tax-credit/)

[Tax Deductions, Expenses](https://www.efile.com/tax-deduction/)

* \_\_\_ [Medical Expenses](https://www.efile.com/medical-deductions/) for the Family
* \_\_\_ Medical Insurance Paid
* \_\_\_ Prescription Medicines and Drugs
* \_\_\_ Doctor and Dentist Payments
* \_\_\_ Hospital and Nurse Payments
* \_\_\_ [Tax Deductible Miles Traveled](https://www.efile.com/tax-deduction/mileage-rates/) for Medical Purposes
* \_\_\_ [Home Mortgage Interest](https://www.efile.com/home-tax-deductions-and-improvements/) from Form 1098
* \_\_\_ Home Second [Mortgage Interest Paid](https://www.efile.com/home-tax-deductions-and-improvements/)
* \_\_\_ Real Estate Taxes Paid
* \_\_\_ State Taxes Paid with Last Year's Return (if claiming
* itemized deductions
* \_\_\_ Personal Property Taxes Paid
* \_\_\_ [Charitable Cash Contributions](https://www.efile.com/tax-deduction/income-deduction/charitable-contributions/)
* \_\_\_ Fair Market Value of Non-cash Contributions to Charities
* \_\_\_ Unreimbursed Expenses Related to Volunteer Work
* \_\_\_ [Tax Deductible Mileage](https://www.efile.com/tax-deduction/mileage-rates/) for Volunteer Purposes
* \_\_\_ Casualty and Theft Losses
* \_\_\_ Amount Paid to Professional Preparer Last Year
* \_\_\_ Unreimbursed Expenses Related to Your Job
* \_\_\_ [Miles Traveled Related to Your Job](https://www.efile.com/tax-deduction/mileage-rates/)
* \_\_\_ [Union and Professional Dues](https://www.efile.com/tax-deduction/employee-expense-deduction/employee-expenses/#union_dues)
* \_\_\_ [Investment Expenses](https://www.efile.com/capital-gains-tax-rates-investment-income-loss-deduction/)
* \_\_\_ [Job-hunting Expenses](https://www.efile.com/tax-deduction/employee-expense-deduction/job-search-expenses/)
* \_\_\_ [IRA Contributions](https://www.efile.com/ira-401k-maximum-contributions-limits/)
* \_\_\_ [Student Loan Interest Paid](https://www.efile.com/student-education-tax-deductions/)
* \_\_\_ [Moving Expenses](https://www.efile.com/tax-deduction/employee-expense-deduction/job-search-expenses/#moving)
* \_\_\_ Last Year's Tax Return Preparation Fee

Tax Estimate Payments

* \_\_\_ [Estimated Tax Payments](https://www.efile.com/self-employed-independent-contractor-income-estimated-taxes/#estimated-taxes) Made with ES Vouchers
* \_\_\_ Last Year's Tax Return Overpayment Applied to This Year
* \_\_\_ Off Highway Fuel Taxes Paid

General Information

* \_\_\_ [Copy of Last Year's Tax Return](https://www.efile.com/copy-tax-return/)

 \_\_\_ Social Security Numbers for You, Your Spouse and Dependents
 \_\_\_ Driver’s License Info (number, issue date and expiration date)

* \_\_\_ [Educational Expenses](https://www.efile.com/tax-return-guide/) for You and Your Spouse
* \_\_\_ Dependents' Names, Years of Birth, and Social Security Numbers
* \_\_\_ Dependents' Post High School Educational Expenses
* \_\_\_ [Child Care Expenses](https://www.efile.com/tax-credit/dependent-care-tax-credit/) for Each Dependent

**E-Filing Information:**

* \_\_\_ Prior Year Adjusted Gross Income (AGI)
* \_\_\_ Routing Transmit Number (RTN) (For direct deposit/debit purposes)
* \_\_\_ Bank Account Number (BAN) (For direct deposit/debit purposes)