

List of Tax Preparation Forms, Documents

Use the checklist below to gather your documents and other forms that you will need to file your taxes. ***Not all items may apply***; keep track of your forms and store copies for your records once you have e-filed your return.

Taxable Income Forms, Documents:

W-2 Form(s) for Wages, Salaries, and Tips
Interest Income Statements: Form 1099-INT & 1099-OID
Dividend Income Statements: Form 1099-DIV
Sales of Stock, Land, etc. for Capital Gains: Form 1099-B
Sales of Real Estate: Form 1099-S
State Tax Refunds: Form 1099-G
Alimony received or paid
Unemployment Compensation received: Form 1099-G
Nonemployment Compensation: Form 1099-NEC
Miscellaneous Income: Form 1099-MISC
Retirement Income: Form 1099-R
Social Security Income and Railroad Retirement Income: Form SSA-1099
Business Income and Expenses
Rental Income and Expenses
Farm Income and Expenses
Form K-1 Income from Partnerships, Trusts, and S-Corporations
Tax Deductible Miles Traveled for Business Purposes

Tax Credits

Child Tax Credit
Child Care Provider Address, I.D. Number and Amounts Paid for the Child and Dependent Care Credit
Earned Income Tax Credit (EITC)
Adoption Expense Information for the Adoption Tax Credit
Foreign Taxes paid
First Time Home Buyer Tax Credit

Tax Deductions, Expenses

	Medical Expenses for the Family
	Medical Insurance Paid
	Self-employed Business Expenses
	Prescription Medicines and Drugs
	Doctor and Dentist Payments
	Hospital and Nurse Payments
	Tax Deductible Miles Traveled for Medical Purposes
	Home Mortgage Interest from Form 1098
	Home Second Mortgage Interest Paid
	Real Estate Taxes Paid
	State Taxes Paid with Last Year's Return (if claiming itemized deductions)
	Personal Property Taxes Paid
	Charitable Cash Contributions
	Fair Market Value of Non-cash Contributions to Charities
	Unreimbursed Expenses Related to Volunteer Work
	Tax Deductible Mileage 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
	Union and Professional Dues
	Investment Expenses
	Job-hunting Expenses
	IRA Contributions
	HSA, FSA Contributions
	Student Loan Interest Paid from Form 1098
	Moving Expenses
	Last Year's Tax Return Preparation Fee

Tax Estimate Payments

	Estimated Tax Payments Made with ES Vouchers or Online
	Last Year's Tax Return Over-Payment Applied to This Year
	Off Highway Fuel Taxes Paid

General Information

	Copy of Last Year's Tax Return
	Social Security Numbers for You and Your Spouse
	Educational Expenses for You and Your Spouse
	Dependents' Names, Years of Birth, and Social Security Numbers
	Dependents' Post High School Educational Expenses
	Child Care Expenses for Each Dependent
	Prior Year Adjusted Gross Income (AGI) - how to find last year's adjusted gross income?
	Routing Transmit Number (RTN) (For direct deposit/debit purposes)
	Bank Account Number (BAN) (For direct deposit/debit purposes)

Business Expense

	Advertising
	Total Car and truck expenses
	Commissions and fees
	Contract labor
	Employee benefit programs
	Business Insurance (other than health)
	Interest
	Mortgage (paid to banks, etc.) 16a
	Legal and professional services (accountant, attorney)
	Office expense
	Rent or lease
	Vehicles, machinery, and equipment purchased
	Other business property
	Repairs and maintenance to office or work location
	Supplies and materials
	Taxes and licenses
	Travel and meals
	a- Travel- Hotels, Events ETC
	b- Deductible meals
	Utilities
	Wages
	Other expenses

Vehicle

Part IV Information on Your Vehicle.

	When did you place your vehicle in service for business purposes? (month/day/year)
	Of the total number of miles, you drove your vehicle during 2022, enter the number of miles you used your vehicle for:
	a- Business
	b- Commuting (see instructions)
	c- Other
	Was your vehicle available for personal use during off-duty hours?
	Do you (or your spouse) have another vehicle available for personal use?
	Do you have evidence to support your deduction?
	If "Yes," is the evidence written?

Other Business Expenses

List of other business expenses which are not listed above

1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	