

List of Tax Preparation Forms, Documents for Individuals

Use the checklist below to gather your documents and other forms that you will need to provide to file your taxes. Not all items may apply.

Taxable Income Forms, Documents

- Common Income and Deduction Forms
- W-2 Form(s) for Income from Wages, Salaries, and Tips
- Interest Income Statements: Form 1099-INT & 1099-OID
- Dividend Income Statements: Form 1099-DIV
- Capital Gains from Stock, Land Sales, **Digital Assets** (ex. Bitcoin) etc.: Form 1099-B
- Real Estate Sales: 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 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 - Dependent's Name, SSN, and Additional Information
- Child Care Provider's Details for Child and Dependent Care Credit
- Earned Income Tax Credit (EITC) - Income Information
- Adoption Expense Information for Adoption Tax Credit
- Foreign Taxes Paid

First Time Home Buyer Tax Credit

Tax Deductions and Expenses

Family Medical Expenses

Medical and Health Insurance Payments (1095-A)

Self-Employed Business Expenses

Prescription Medications and Drugs

Doctor and Dentist Payments

Hospital and Nurse Payments

Tax Deductible Miles Traveled for Medical Purposes

Home Mortgage Interest from Form 1098

Second Home Mortgage Interest Paid

Real Estate Taxes Paid

State Taxes Paid from Last Year (if claiming itemized deductions)

Personal Property Taxes Paid

Charitable Cash Contributions

Fair Market Value of Non-cash Contributions to Charities

Unreimbursed Volunteer Work Expenses

Tax Deductible Mileage for Volunteer Purposes

Casualty and Theft Losses

Fees Paid to Professional Preparers Last Year

Job-Related Travel Miles

Investment Expenses

IRA Contributions

HSA, FSA Contributions

Student Loan Interest Paid from Form 1098-E

Moving Expenses (If Applicable)

Last Year's Tax Return Preparation Fee

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, Birth Years, and Social Security Numbers

___ Post High School Educational Expenses for Dependents

___ Child Care Expenses for Each Dependent

___ Prior Year Adjusted Gross Income (AGI)

___ Routing Transmit Number (RTN) and Bank Account Number (BAN) for Direct Deposit/Debit