

# Tax Document Checklist

- At least one document to prove child dependent's residency
  - ✓ School records or statement
  - ✓ Medical records
  - ✓ Child care provider records
  - ✓ Place of worship statement
  - ✓ Social Security Card
  - ✓ Birth Certificate
  - ✓ Any other document showing child's residency
- Valid Photo ID
- Social Security numbers and birthdates for everyone included on your return (you, your spouse, children, parents, etc.)
- All forms that say W-2, 1098, 1099, or (Schedule) K-1
- Last year's tax return and amount paid for preparing the tax return - if new client
- Records for Mortgage interest, real estate and personal property tax (car registration)
- Records of childcare (provider's name, address, SSN or EIN, and phone number)
- Records of higher education costs (1099-T, receipts for books, fees, etc)
- Records of other income (social security, unemployment, rental, jury duty, gambling, hobby, alimony, interest income, etc.)
- Income and expense records for work you performed (not shown on a W-2 or 1099)
- Amount donated to houses of worship, schools and other charitable organizations
- Records of non-cash charitable donations
- Amounts paid for health care insurance and to doctors, dentists, hospitals, etc. (including co-pays and out of pocket expenses)
- Number of miles driven for charitable or medical purposes
- Employment -related expenses (dues, travel, publications, tools, uniform costs and cleaning, etc.)
- Records of any contributions you made to IRA or other retirement plans
- Job search expenses
- Records showing sales tax for major purchases (Car, Boat, RV, etc.)
- Expenses related to your investments
- Purchase dates and your total investment in any stocks or other property you sold
- IRA, SEP, SIMPLE and other retirement plan contributions
- Medical savings account (HSA, Archer, etc.)
- Casualty and theft loss
- Energy credit expenditures

