

Carrie Houchins-Witt, CFP®, EA
Tax Preparation Checklist

	Taxpayer	Spouse	Information
Last Year's Tax Returns (Federal and State)			Data
Copy of Driver's License for Taxpayer and Spouse			
Full Name, SSN, Date of Birth			Data
Children's Names, SSNs, Dates of Birth			Data
INCOME			
W-2 Forms			Form
1099 Forms (Misc., Interest, Dividends, etc.)			Form
Other income (Alimony received, Gambling, etc.)			Amount and Type
DEDUCTIONS			
Above-the-line deductions for all taxpayers			
Educator Expenses (for teachers) - Includes Professional Development			Amount
Moving Expenses			Amount and Type
Alimony Paid			Amount
IRA Contributions			Amount and Type
1098 Forms (Student Loan Interest, Tuition, Mortgage Interest)			Form
Health insurance premiums paid (if paid after-tax)			Amount
Other deductions			Amount and Type
Below-the-line deductions for Schedule A filers			
Property Tax Paid (May be on form 1098)			Amount
Auto registration paid			Make/Model and total for each car
Medical Expenses (If they exceed 7.5% of your income)			Amount
Charitable Contributions			Charity, Date, Amount, Item, Value (if not cash/check)
Misc. (Unreimbursed expenses from W2 job, Tax Prep Expenses, Casualty Losses, etc.)			
CREDIT INFORMATION			
Dependent care credit			Provider name, EIN, address, amount per child
Any other credits			
HEALTH INSURANCE			
Proof of health insurance for each person on tax return			Form 1095 or other proof
Exempt from coverage?			Form provided by marketplace
MISCELLANEOUS			
Estimated tax payments made			Dates and amounts
Any other relevant information			