



# Tax Prep Check List



## Income Received

- W2/Wage Statements
- Retirement and Pensions Form 1099-R
- Investment Income Form 1099-S, B
- Self- Employment Income Form 1099-MISC
- Social Security Form SSA-1099
- Interest/Dividends Form 1099-INT/DiV
- Education Scholarships Form 1098-T
- Rental Property Income

## Expenses Paid

- Retirement Account Contributions (HSA, IRA, Etc)
- Child or Dependent Care Expenses (Daycare)
- Qualified Educational Expenses
- Student Loan Interest Form 1098-E
- Educational Supply Expenses
- Charitable Donation Records

## Don't Forget!

- I.D's, Birth dates, and Social Security Numbers
- Bank account & Routing numbers
- IRS I.D Pin Number if previous tax fraud