



### Tax information checklist

#### Personal Info

- SSN or ITIN full name and birthdate for everyone that'll be included on your tax return.  
Yes, you can still claim your dependent under 17 as a dependent. The child tax credit is less.
- If you paid any alimony before 2018 it is still deductible. Please provide the spouse's name and SSN
- If you have dependents that are in daycare. I need the name of the daycare and the Provider's EIN or SS number to be able to claim daycare expenses.

#### Income and Investments and Retirement

- All forms of W-2's, 1099's bank interest, dividends, and any 1099 R's which is retirement or a distribution from a 401 or IRA.
- K-1 distribution
- For any stock transaction, the info I need would be a 1099-B. I also need the bought/purchase date and cost, with the sell date and proceeds.
- Closing statements for any real estate transactions such as purchases, selling, cash out, and refinances
- Any records of contributions to IRA or any other retirement plan
- Any gambling winnings and losses
- Any state refunds
- Unemployment or 1099-G
- Anything that says important tax info
- 1099-C cancellation of debt

#### Education

- 1098-T
- 1098-E
- Any expenses for school i.e., books, laptops, and/or tuition

#### Itemized Dedications

- 1098 from Mortgage co
- Property taxes
- Sale tax from large purchases
- Cash donations including tithing statements
- Noncash donations i.e., Goodwill, etc.
- Miles drove for volunteering

#### Health Care

- 1095 A, B, or C proof of medical
- HSA and MSA
- If you pay your own medical premiums and out of pocket medical expenses that are over 7.5% of your total income. An example of this is if your income is \$50000 X 7.5% = \$3750 or more medical that you paid before you can count any of it
- Amounts you pay not listed on a paystub
- Prescriptions, Copay, and/or deductibles

#### Medical Premiums

- Amounts you pay not listed on a paystub
- Prescriptions, Copay, and/or deductibles