PITTMAN
Legal & Tax Advisors

Personal Tax Preparation Checklist

Check the applicable boxes below and return this checklist with your client material.

Personal Information:

- ❑ Taxpayers' full legal name, date of birth and social security number.
- ❑ Taxpayers' cell or home telephone number and email address.
- ❑ **<u>Dependent(s)</u> full legal name, date of birth and social security number, and months resided with taxpayer.**
- ❑ Form 8332 executed by custodial parent, if applicable.
- ❑ Home address and county of residence.
- ❑ **Copy of taxpayers' <u>driver's license</u>.**

Incomes:

- ❑ W-2s for each employer.
- ❑ W-2G for gambling winnings and/or a detailed record of losses.
- ❑ 1099s for all income reported to the IRS: Dividend income (1099-DIV), Interest income (1099-INT), Miscellaneous income (1099-MISC), Retirement (1099-R), sale of home or real estate (1099-S), Unemployment compensation or State Tax Refund (1099-G).
- ❑ Rental income.

Deductions:

- ❑ 1098-S Mortgage Interest and Real Estate Taxes on a residence or rental properties.
- ❑ 1098-T Education Expenses: scholarships, itemized receipts of qualified educational expenses.
- ❑ 1099s prepared by client.
- ❑ Child & Dependent Care Expenses: name, address, Tax ID or Social Security Number of the child care provider and amount paid per child.
- ❑ Business Expenses for self-employed individuals.
- ❑ Charitable Contributions: detailed list of donations, date of contributions, receipts and dollar value of the donation.
- ❑ Vehicle excise and sales tax paid.
- ❑ Moving expenses, date of move and distance between your former and new home (Military only).
- ❑ Medical expenses: insurance premiums, doctor, dentist, eye care, and prescriptions.
- ❑ Health Savings Account contributions (Form 1099-SA) and distributions (Form 5498-SA).
- ❑ Energy saving home improvement receipts.
- ❑ Last year tax preparation fees, if not prepared by us.
- ❑ Rental expenses detailed per category.
- ❑ Student loan interest.

Other:

- ❑ **<u>Bank account and routing numbers</u> for direct deposit of your refund.**
- ❑ **<u>Estimated Tax Payments</u> – include amount paid, date you made the payment and for which quarter. If you have a copy of the check or receipt if paid online, include a copy.**
- ❑ Settlement statement(s) for the sale of real estate.
- ❑ Last year's tax return, if not prepared by us.
- ❑ 1095-A if you received credit from the healthcare.gov marketplace.
- ❑ Proof of medical insurance – insurance card or billing information.

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