PITTMAN
Legal & Tax Advisors

Personal Tax Preparation Checklist

We encourage clients to upload tax documents to us securely. Contact a team member if you need the secure link.

Personal Information:

- ❑ Taxpayers' full legal name, date of birth and social security number.
- ❑ Taxpayers' cell or home telephone number and email address.
- ❑ Dependent(s) full legal name, date of birth, social security number, & months resided with taxpayer.
- ❑ Form 8332 executed by custodial parent, if applicable.
- ❑ Home address and county of residence as of January 1, 2022.
- ❑ Copy of taxpayers' driver's license.

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.
- ❑ Child & Dependent Care Expenses: name, address, Tax ID or Social Security Number of the childcare provider and amount paid per child.
- ❑ Business Expenses for self-employed individuals.
- ❑ Charitable Contributions: detailed list of donations, contribution date, receipts & value of the donation.
- ❑ Did you purchase an electric/hybrid vehicle.
- ❑ 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 (HSA) contributions (Form 1099-SA) and distributions (Form 5498-SA).
- ❑ Personal rent paid in 2022, include # of months and monthly rent, name & address of Landlord
- ❑ Last year tax preparation fees, if not prepared by us.
- ❑ Rental expenses detailed per category.
- ❑ Contribution to a 529 College Savings Plan. Withdrawn funds from 529 Plans, Form 1099-Q needed.
- ❑ Student loan interest, Form 1098-E.

Other:

- ❑ Bank account and routing numbers for direct deposit of your refund.
- ❑ Estimated Tax Payments – 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.
- ❑ Head of Household (HOH): If you are claiming HOH, our office needs proof to claim on taxes.
- ❑ SOLD HOUSE: 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.
- ❑ Foreign Accounts: Do you have any foreign accounts?
- ❑ In 2022, did you receive, sell, send, exchange or acquire any financial interest in any virtual currency?

Please understand that if incorrect information is provided, this could delay your return being processed and/or result in you receiving a tax notice. Any tax notice caused by an error or omission from our team will be handled swiftly and at no cost to the client. All other responses to notices are outside the scope of our original work and subject to our hourly rates.