

# WHAT TO BRING TO YOUR PERSONAL TAX APPOINTMENT

## Personal Tax Checklist



### PERSONAL DATA

- Social Security Numbers (including spouse and children). Don't forget about your new baby!
- Childcare provider tax I.D. or Social Security Number

### EMPLOYMENT & INCOME DATA

- W-2 forms for this year
- Tax refunds and unemployment compensation: Form 1099-G
- Miscellaneous income including rent: Form 1099-MISC
- Partnership and trust income
- Pensions and annuities
- Alimony received
- Jury duty pay
- Gambling and lottery winnings
- Prizes and awards
- Scholarships and fellowships
- State and local income tax refunds
- Unemployment compensation

### HOMEOWNER/ RENTER DATA

- Residential address(es) for this year
- Mortgage interest: Form 1098
- Sale of your home or other real estate: Form 1099-S
- Second mortgage interest paid
- Real estate taxes paid
- Rent paid during tax year
- Moving expenses (if in active military, and moving for new orders)
- Reimbursements for moving (counts as ordinary income)

### AUTOMOBILES

- Personal property tax information
- Department of Motor Vehicles fees

### HEALTH INSURANCE INFORMATION

**NOTE** — As it says on the IRS health insurance information page, form 1040 will not have the “full-year health care coverage or exempt” box and Form 8965, Health Coverage Exemptions will no longer be used. You need not make a shared responsibility payment or file Form 8965, Health Coverage Exemptions, with your tax return if you don't have minimum essential coverage for part or all of the year.

- All 1095-A Forms from Marketplace providers (if you purchased insurance through a Marketplace)
- Records of credits and/or advance payments received from the Premium Tax Credit (if claiming)

### FINANCIAL ASSETS

- Interest income statements: Form 1099-INT & 1099-OID
- Dividend income statements: Form 1099-DIV
- Proceeds from broker transactions: Form 1099-B
- Retirement plan distribution: Form 1099-R
- Capital gains or losses

### FINANCIAL LIABILITIES

- Auto loans and leases (account numbers and car value) if vehicle used for business
- Student loan interest paid
- Early withdrawal penalties on CDs and other fixed time deposits

### EXPENSES

- Gifts to charity (receipts for any single donations of \$250 or more)
- Expenses related to volunteer work that have not been reimbursed
- Investment expenses
- Job-hunting expenses
- Education expenses (tuition and fees)
- Child care expenses
- Medical Savings Accounts
- Adoption expenses

### SELF-EMPLOYMENT DATA

- Estimated tax vouchers for the current year
- Self-employment tax
- Self-employment SEP plans
- Self-employed health insurance
- K-1s on all partnerships
- Receipts or documentation for business-related expenses
- Farm income

### DEDUCTION DOCUMENTS

- State and local income taxes (note: \$10,000 limit, as last year)
- IRA, Keogh and other retirement plan contributions
- Medical expenses
- Other miscellaneous deductions