



Taxpayer Checklist

(Information you will need before getting your taxes prepared)

Personal Info:

Valid Picture ID
Social Security Card for You and Dependents

New forms may be used for upcoming tax season.

Form 1095-A (Health Insurance Marketplace Statement)
Form 8962 (Premium Tax Credit, & Instructions)
Form 8965 (Health Coverage Exemptions & Instructions)

Income

W2's
1099-INT (Interest Income)
1099-DIV (Dividend Income)
1099-MISC (Miscellaneous Income)
Self-Employment Income
Rental Income
Gambling or Lottery Winnings

State Income Tax Refund
1099-R (Pension Income)
1099-G (Unemployment Compensation)
1099-B (Proceeds from Broker and Barter Exchange)

Expenses

Real Estate Taxes
Mortgage Interest
Student Loan Interest
Moving Expenses
Education Expenses (No more than \$250)
Child Care Expenses "If someone keeps your child or children at home you will need their social security number and address"

Tithes and Offering
Charitable Contributions

Expenses for Small Business (Avon, Mary Kay, Babysitting, etc.....)

Advertising
Car or Truck Expenses
Commissions and Fees
Insurance
Legal and Professional Service

Repairs and Maintenance
Supplies
Taxes and License
Travel, Meals and Entertainments
Misc. Items (cell phone, clothing, & etc.)