

Tax Preparation Checklist

Personal Information

Social Security numbers for yourself, spouse, dependents.

Bank Account Information

For direct deposit of refunds or electronic payments.

Income Documents

W-2 forms, 1099 forms, investment income statements, other income documentation.

Credits Information

Education expenses, retirement contributions, energy-efficient home improvements.

Deduction Documents

Mortgage interest statements, property tax receipts, medical expenses, charitable donations.

Previous Year's Tax Return

For reference and to make comparisons.

Additional Documents

Any other relevant financial information or notices received from the IRS.