

2016 Tax Preparation Checklist

PERSONAL INFORMATION:

- Photo identification for you and your spouse
- Both spouses must be present to sign required forms
- Social Security cards for you, your spouse and dependents
- Birthdates for everyone on the tax return
- Copy of last year's tax return

CHILDCARE AND OTHER EXPENSES

- Childcare expenses and providers address and SS# or provider's business employee identification number
- Amount of alimony paid, as well as your ex-spouse's full name and SS#
- Form 8332 for claiming a child

EDUCATION PAYMENTS

- Form 1098-T for tuition and other educational expenses
- Itemized receipts for qualified educational expenses
- Scholarship or fellowship records
- Form 1098-E for student loan interest

EMPLOYMENT & OTHER INCOME

- All 2016 income documents, for all employers, banks or other sources (W-2, W-2G, F-1099s, F-1099R, SSA)
- Form 1099-MISC for self-employment
- 1099-G, W-2G, 1099-SA, 10
- Form 1095-A, if you or anyone on your return had coverage through the Health Insurance Marketplace
- Form 1095-B and/or 1095-C for insurance received through an employer
- Banking routing and account numbers for direct deposit

RETIREMENT INCOME AND CONTRIBUTION

RENTAL PROPERTY INCOME & EXPENSES

SAVINGS AND INVESTMENT-1099-INT, 1099-DIV, 1099-B, 1099-S