














Black & Gold Tax Service

# Tax Prep Checklist





## Personal Information

-  **Social Security Card and/or ITINS Card**
-  **Full names and Birthdates for everyone included on return**
-  **Identity Protection PIN (IP PIN) for everyone on the return (you would have applied for this from the IRS)**
-  **Childcare records (including the provider's ID number)**
-  **Amount of alimony paid and ex-spouse Social Security number**
-  **Drivers license information for you (and your spouse) if applicable**

## Income/Investments/Retirement

-  **All income forms that say W-2, 1098, 1099, etc...**
-  **Record of any other income and expenses i.e. (jury duty, gambling, hobby income, etc...)**
-  **Closing Statements for any real estate purchased or sold**
-  **Record of Rental property income and expenses (see Rental Checklist)**
-  **Stock information: purchase date and total investment of any stock sold**
-  **Record of any IRA's or any other retirement and/or investment accounts**
-  **Record of Business income and expenses (see Self Employment Checklist)**

## Itemized Deductions

-  **Form 1098 Mortgage Interest formn all banks**
-  **Records of any property lost or damaged due to a natural disaster or theft**
-  **Mortgage Interest (if not on 1098), real-estate and personal property tax records**
-  **Records of Donations to Charity**

## Education and Health Care

-  **Form 1098 T and record of tuition and higher education expenses**
-  **Student loan interest (form 1098E)**
-  **Form 1095-A, 1095-B, or 1095-C insurance form**
-  **HSA information (form 5498, 1099-SA) and receipts for medical expense**