**2018 Tax Preparation Checklist**

**General Taxable Income**

\_\_\_ Dividend Income Statements: Form 1099-DIV

\_\_\_ Interest Income Statements: Form 1099-INT & 1099-OID

\_\_\_ Miscellaneous Income: Form 1099-MISC

\_\_\_ Sales of Real Estate: Form 1099-S

\_\_\_ Sales of Stock, Land, etc.: Form 1099-B

\_\_\_ State Tax Refunds: Form 1099-G

\_\_\_ Unemployment Compensation Received

\_\_\_ W-2 Form(s) for Wages, Salaries, and Tips

**Retirement Income**

\_\_\_ Railroad Retirement & Social Security Income: Form SSA-1099

\_\_\_ Retirement Income: Form 1099-R

**Business Income**

\_\_\_ Business Income and Expenses

\_\_\_ Farm Income and Expenses

\_\_\_ Form K-1 Income from Partnerships, Trusts, and S-Corporations

\_\_\_ Rental Income and Expenses

\_\_\_ Tax Deductible Miles Traveled for Business Purposes

**Tax Credits Checklist**

\_\_\_ Adoption Expense Information

\_\_\_ Child Care Provider Address, I.D. Number and Amounts Paid

\_\_\_ First Time Home Buyer Tax Credit

\_\_\_ Foreign Taxes paid

**Expense and Tax Deduction Checklist**

\_\_\_ Amount Paid to Professional Preparer Last Year

\_\_\_ Casualty and Theft Losses

\_\_\_ Charitable Cash Contributions

\_\_\_ Doctor and Dentist Payments

\_\_\_ Fair Market Value of Non-cash Contributions to Charities

\_\_\_ Home Mortgage Interest from Form 1098

\_\_\_ Home Second Mortgage Interest Paid

\_\_\_ Hospital and Nurse Payments

\_\_\_ Investment Expenses

\_\_\_ IRA Contributions

\_\_\_ Job-hunting Expenses

\_\_\_ Last Year's Tax Preparation Fee

\_\_\_ Medical Expenses for the Family

\_\_\_ Medical Insurance Paid

\_\_\_ Miles Traveled for Volunteer Purposes

\_\_\_ Miles Traveled for Medical Purposes

\_\_\_ Miles Traveled Related to Your Job

\_\_\_ Moving Expenses

\_\_\_ Personal Property Taxes Paid

\_\_\_ Prescription Medicines and Drugs

\_\_\_ Real Estate Taxes Paid

\_\_\_ State Taxes Paid with Last Year's Return (if itemized)

\_\_\_ Student Loan Interest Paid

\_\_\_ Tax Deductible Unreimbursed Expenses Related to Your Job

\_\_\_ Union and Professional Dues

\_\_\_ Unreimbursed Expenses Related to Volunteer Work

**Tax Estimate Payments Checklist**

\_\_\_ Estimated Tax Payments Made with ES Vouchers

\_\_\_ Last Year's Tax Return Overpayment Applied to This Year

\_\_\_ Off Highway Fuel Taxes Paid

**General Information**

\_\_\_ Bank Account Number (BAN) (For direct deposit/debit purposes)

\_\_\_ Child Care Expenses for Each Dependent

\_\_\_ Copy of Last Year's Tax Return

\_\_\_ Dependents' Names, Years of Birth, and Social Security Numbers

\_\_\_ Dependents' Post High School Educational Expenses

\_\_\_ Educational Expenses for You and Your Spouse

\_\_\_ Prior Year Adjusted Gross Income (AGI) & Personal Identification

\_\_\_ Routing Transmit Number (RTN) (For direct deposit/debit)

\_\_\_ Social Security Numbers for You and Your Spouse