TAX PREPARATION CHECK LIST

PLEASE BRING, MAIL, or POST THAT WHICH APPLIES TO YOU

* A valid driver’s license or state ID for you and spouse if married (for **new** clients only)
* W2 Wages from all places of employment
* W2-G Lottery and gambling winnings
* 1099-R Pensions/annuities/IRAs/rollovers
* K-1’s PartnershipS, S-Corporations, trusts
* 1099-INT Interest earned
* 1099-DIV Dividends earned
* 1099-B Stock sales – need purchase dates and cost when purchased
* 1099-G Unemployment compensation, state refund
* 1099-SSA Social Security Benefits
* Form 5498 Annual report of IRA balances
* Federal and state tax estimates paid: list of dates paid (including year) and amounts
* Name, address, tax ID, and amount paid to each childcare provider for the year
* Form 1098 mortgage interest statement for primary and secondary homes
* Closing statements for all real estate bought or sold this year
* Cost of energy improvements and invoices
* Charitable donations to IRS recognized charities and religious institutions
* Receipts for non-cash charitable contributions
* Social Security card for **new** dependents, **new** spouse, and **new** clients
* Real estate taxes paid on all real estate
* Excise taxes on your auto, boat, RV, motorcycle, plane, etc.
* Bursar’s office statement for college tuition, books, and fees, paid for you, spouse, dependents
* Student loan interest
* Educator expenses for teacher’s classroom supplies
* Traditional and Roth IRA contributions made (not 401(k) or 403(b))
* Proof of health insurance
* Medical payments for doctors, dentists, hospitals, nursing homes, prescriptions, eye-care
* Out-of-pocket health insurance paid and long term care insurance paid
* Number of medical, charitable and business miles if deductible
* Sales tax for new vehicles purchased
* Business/rental income, and expenses by category
* Description, cost, and purchase date of business/rental assets
* List of assets traded, sold or disposed
* 1099-NEC and 1099-MISC statements issued to and from contractors or others
* Business expenses by category for the self-employed or independent contractors
* Year-end payroll reports if you had employees
* Home office: square feet of both home and office, utilities, homeowner’s insurance, rent, repairs
* If you pay rent – name, address of landlord, and total amount paid for the year
* Any IRS or state correspondence received during the year
* If you are 65 or older - real estate tax bills and water/sewer bills

The IRS requires Ameritax to keep backup documentation if you are claiming:Head of Household, Earned Income Credit, Additional Child Tax Credit for dependents less than 17 years old, American Opportunity Credit for college costs: if you are claiming any of these credits, bring or post birth certificates for newly born dependents, and proof that the child lives with you in the form of medical and/or school records.