

Personal Tax Preparation Checklist

Before you begin your tax filing, take a moment to review this helpful checklist. Highlight the areas that apply to you, and make sure you have that information ready. Better yet, attach this list to a folder with your tax documents and check off each item as you add it to the folder. This will keep you organized and ensure you don't miss anything important. Keep in mind, you may need additional documents based on your unique situation.

General Information

- Valid government-issued ID for all adults in the household
- Social Security Numbers for you, your spouse, and dependents
- Income tax returns from the prior two years
- Depreciation schedules from prior years for businesses, rentals, etc.

Income

- W-2 forms for wage and tax statements

Retirement Income

- 1099-R forms for IRA distributions, pensions, and annuities
- SSA-1099 for Social Security benefits
- RRB-1099 for Railroad Board benefits
- Form 1099-INT for interest income
- Form 1099-D for dividend income

Self-Employment

- 1099-NEC forms for non-employee compensation
- 1099-K forms from credit card, debit card, and third-party network transactions
- Schedule C for self-employed business income
- Reportable payment transactions

Rental Income

- Form 1099-MISC showing rent payments received
- Schedule E for income from rental real estate and royalties
- Depreciation schedules



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Real Estate Income

- Form 1099-S for proceeds from real estate transactions
- Basis information for assets or property sold

Farm Income

- Schedule F for farm income
- Form 4835 for farm rental income
- Form 1099-G for government payments

Other Common Forms of Income

- Form W2-G for gambling income
- Form 1099-MISC for miscellaneous income
- 1099-G for unemployment compensation
- Schedule K-1 for income from partnerships, S corporations, estates, and trusts
- Basis information for any partnerships and S corporations
- Form 1099-B for documentation of brokerage transactions and disposition of capital assets
- Cancellation of debt

Tax Deductions

Education

- Educator classroom expenses
- Student loan interest
- Refunded student loan interest payments
- Student loan forgiveness
- Tuition and fees for higher education

Healthcare

- Contributions to a Health Savings Account
- Expenses related to child or dependent care
- Medical and dental expenses

Other Common Forms of Tax Deductions

- Alimony deduction
- Employee business expenses
- Unreimbursed employee expenses
- Expenses related to work relocation with the military
- Contributions to a Retirement Savings Account
- Real estate taxes
- Other state and local taxes



- Mortgage interest
- Investment interest
- Investment expenses
- Cash contributions
- Noncash contributions (provide organization name) _____
- Gambling losses

YES / NO

- Proof of identity for those claimed on the return (driver's license or state issued ID, Social Security card, birth certificates for children, etc.)
- Income tax returns from the prior two years
- Depreciation schedules from prior years for businesses, rentals, etc.

Dependent Information

- Did you have any changes in dependents during the year?
- Can another person qualify to claim any of your dependents?
- Are you eligible for the Child and Dependent Care Credit?

Need assistance? **We're here to help!**

Whether you're filing your taxes for the first time or just need a little extra support, we're here to make the process easy and stress-free. Our team at Fully Accountable is ready to assist you with accurate and efficient tax preparation.

Contact us today: **1-877-330-9401** [fullyaccountable.com](https://www.fullyaccountable.com)