

# Tax Preparation Checklist

A free tax season preparation checklist that you can copy, save or download as a free PDF.

Last updated in 2019. Perfect for personal taxes, accountants, and clients.



## Have these documents in hand before you e-file:

- Social Security number for everyone listed on your tax return
- W-2 forms from employers
- 1099 forms for contract work completed
- Income from investments (i.e., from interest, dividends, stocks/bonds, and foreign investments)
- Prior year income from local/state tax refunds
- Business income records, if you own a business
- Income from unemployment
- Income from rental properties
- Social Security benefits
- Other income (e.g., gambling, award money from the lottery, jury duty, medical savings account income)
- Brokerage account statements
- Health insurance coverage documents
- Receipts (from charity, medical expenses, and any unreimbursed business expenses)

## Credits you may be eligible for

- Earned income credit
- Child and dependent care credit
- Homebuyer credit
- Energy credit

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- Savers credit
- Adoption credit
- Child credit
- Credit for the elderly/disabled
- American opportunity credit
- Lifetime learning credit
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## **Possible Deductions**

- IRA contributions
- Mortgage interest
- Student loan interest
- Medical savings account (MSA) contributions
- Self-employed health insurance
- Moving/relocation expenses
- Medical expenses
- Qualified business expenses
- Theft loss
- Charitable giving

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