



Tax Preparation Checklist: Things to Bring When Visiting BYB

Personal Data

- Social Security Numbers (including spouse and children)
- Child care provider tax I.D. or Social Security Number

Employment & Income Data

- W-2 forms for this year
- Tax refunds and unemployment compensation Form 1099-G
- Misc. income including rent: Form 1099-Misc
- Partnership and trust income
- Pensions and annuities
- Alimony received
- Jury duty pay
- Gambling and lottery winnings
- Prizes and awards
- Scholarships and fellowships
- State and local income tax refunds
- Unemployment compensation

Homeowner/Renter Data

- Residential address(es) for this year
- Mortgage interest: Form 1098
- Sale of your home or other real estate: Form 1099-S
- Second mortgage interest paid
- Real estate taxes paid
- Rent paid during tax year
- Moving expenses

Financial Assets

- Interest income statements: Form 1099-INT& 1099-OID
- Dividend income statements: Form 1099-DIV
- Proceeds from broker transactions: Form 1099-B
- Retirement plan distributions: Form 1099-R
- Capital gains or losses

Deduction Documents

- State & Local income taxes
- IRA and other retirement plan contributions
- Medical Expenses
- Casualty or theft losses
- Other misc. deductions

Financial Liabilities

- Auto loans and leases (account numbers and car value) if vehicle used for business
- Student loan interest paid
- Early withdrawal penalties on CDs and other time deposits

Automobiles

- Personal property tax information
- Department of Motor Vehicle fees

Expenses

- Gifts to charity (receipts for any single donations of \$250 or more)
- Unreimbursed expenses related to volunteer work
- Unreimbursed expenses related to your job (travel expenses, entertainment, uniforms, union dues, subscriptions)
- Investment expenses
- Job-hunting expenses
- Education expenses (tuition and fees)
- Child care expenses
- Medical Savings Accounts
- Adoption expenses
- Alimony paid
- Tax return preparation expenses and fees

Self-Employment Data

- Estimated tax vouchers for the current year
- Self-employment tax
- Self-employment SEP plans
- Self-employed health insurance
- K-1s on all partnerships
- Receipts or documentation for business-related expenses

Other items Notes:
