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# Tax Prep Checklist

## Personal Information

- **A Social Security or tax ID number for everyone included on your tax return**  
-You need your own number, but don't forget your spouse and dependent's (where applicable) as well. If someone doesn't have a Social Security number, you'll need their TIN instead.
- **Date of birth for everyone on your return.**

## Income and Investment Information

- **Form W-2 Wage and Tax Statement** -Your W-2 shows how much you earned and how much was withheld for taxes. Your employer has until February to send you your form. If you haven't received yours, go ahead and request it.
- **Bank or financial institution statements** – Did you make contributions to an IRA? You'll need a Form 5498. Are you paying down student loan debt? Be sure to grab your Form 1098-E. Did you take out a home mortgage? Be sure to have your Form 1098 Mortgage Interest Statement.
- **Last year's state refund amount** – If you itemize your deductions, then your state refund is considered income for tax purposes.
- **Other miscellaneous income records** – This could include award money, gambling winnings, lottery pay-outs, etc.
- **Any (and all) Form 1099s** – There are several different types of 1099. Some of the common ones include:
  - 1099-MISC if you are self-employed and received \$600+ from a client
  - 1099-DIV if you received dividends
  - 1099-G if you received money or benefits from the government
  - 1099-K if you made third-party transactions (through PayPal or Venmo, for example)

- 1099-R for distributions from a retirement plan, IRA, pension, annuity, etc.

## Self-Employment and Business Records (where applicable)

- **Business expense records** – These could be receipts, credit card statements, records of checks you've written, etc.
- **[Quarterly estimated tax payment receipts](#)** – If you make installments to your tax bill during the year, the IRS (and your state) should send you a record of what you paid – similar to a receipt.
- **Mileage records** – In order to get a deduction for your travel, you'll need to know how many miles you drove for work purposes.
- **Home office expenses** – Taking the home office deduction? You'll need to know how big your space is in square feet. If you decide to use the actual expense method, you'll also need a record of your home-related expenses, like utilities and mortgage (or rent).

## Medical Expense Receipts and Records

- **Receipts for unreimbursed medical expenses** – These could include exams, surgeries, and preventative care. It could also be braces, glasses, hearing aids, prescriptions – even transportation to and from treatment.
- **Form 1095: Health insurance coverage forms** – If you are enrolled through the Marketplace, you'll receive Form 1095-A. Insurance providers will send a 1095-B for individuals they cover. If your employer offers coverage, they should send you a 1095-C.
- **Social Security benefits** – If you receive Social Security, you'll receive an SSA-1099 in January showing the total amount of benefits you received for the year.

## Charitable Donations

- **Charitable donation receipts** – If you are planning to take a tax deduction for the donations you made to charity, you'll need to be able to back them up with receipts showing the date, value, and charitable organization.

## Other Homeownership Info

- **Property tax receipts** – If you itemize your deductions, you could write off a portion of the property taxes you paid.

