

## Tax Checklist

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### Personal Information

- ☐ Access the secure TaxesToGo app and complete the personal info requested. For an instructional video on how to navigate the app, visit the Links page of our website.

### Income

#### Employed

- ☐ W-2

#### Unemployed

- ☐ 1099-G

#### Self-Employed

- ☐ Fill out the appropriate self-employed checklist in the links page of our website. Once that is filled out, you can upload a scanned or digital copy to the documents section of the TaxesToGo app.

#### Rental Income

- ☐ Fill out the rental checklist in the links page of our website. Once that is filled out, you can upload a scanned or digital copy to the documents section of the TaxesToGo app.

#### Retirement Income

- ☐ Pension/IRA/annuity income (1099-R)
- ☐ Social Security/RRB income (SSA-1099 / RRB-1099)

## **Income (continued)**

### **Savings & Investments or Dividends**

- ☐ Interest and/or dividend income (1099-INT, 1099-OID, 1099-DIV)
- ☐ Income from sales of stock or other property (1099-B, 1099-S)
- ☐ Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- ☐ Expenses related to your investments
- ☐ Record of estimated tax payments made (Form 1040-ES)
- ☐ Transactions involving cryptocurrency

### **Other Income & Losses**

- ☐ Gambling income (W-2G or records showing income and expense records)
- ☐ Jury duty records
- ☐ Hobby income and expenses
- ☐ Prizes and awards
- ☐ Trust income
- ☐ Royalty income (1099-MISC)
- ☐ Any other 1099's received
- ☐ Record of alimony paid/received with ex-spouse's name and SSN
- ☐ State tax refund

## **Deductions**

### **Home and Vehicle Ownership**

- ☐ Forms 1098 or other mortgage interest statements
- ☐ Real estate and personal property tax records
- ☐ Receipts for energy saving home improvements
- ☐ Electric vehicle information
- ☐ All other 1098 series forms

### **Charitable Donations**

- ☐ Cash amounts donated to churches, schools, other charitable organizations
- ☐ Records of non-cash charitable donations
- ☐ Amounts of miles driven for charitable or medical purposes

### **Medical Expenses**

- ☐ Amounts paid for healthcare, insurance, and to doctors, dentists, and hospitals
- ☐ Amounts paid for qualified insurance premiums if paid outside of the Marketplace or an employer provided plan

## **Deductions (continued)**

### **Health Insurance**

- ☐ Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)

### **Childcare Expenses**

- ☐ Fees paid to a licensed day care center or family day care for care of an infant or preschooler
- ☐ Amounts paid to a baby-sitter or provider care of your child under age 13 while you work
- ☐ Expenses paid through a dependent care flexible spending account at work

### **Educational Expenses**

- ☐ Forms 1098-T from educational institutions
- ☐ Receipts that itemize qualified educational expenses
- ☐ Records of any scholarships or fellowships you received
- ☐ Form 1098-E if you paid student loan interest

### **K-12 Educator Expenses**

- ☐ Receipts for classroom expenses (for educators in grades K-12)

### **State and Local Taxes**

- ☐ Amount of state and local income or sales tax paid (other than wage withholding)
- ☐ Invoice showing amount of vehicles sales tax paid and/or personal property tax on vehicles

### **Retirement & Other Savings**

- ☐ Form 5498-SA showing HSA contributions
- ☐ Form 5498 showing IRA contributions
- ☐ All other 5498 series forms (5498-QA, 5498-ESA)

### **Federally Declared Disaster**

- ☐ City/county you lived/worked/had property in
- ☐ Records to support property losses (appraisal, clean-up costs, etc.)
- ☐ Records of rebuilding/repair costs
- ☐ Insurance reimbursements/claims to be paid
- ☐ FEMA assistance information
- ☐ Check the FEMA website to see if your county has been declared a federal disaster area