

TAX PREP CHECKLIST

WHAT YOU NEED TO BRING TO FILE YOUR TAXES



PERSONAL INFORMATION // FOR YOU AND ANYONE ELSE LISTED ON YOUR RETURN.

- SSN or ITIN, full names and birth dates for everyone included on your return
- Amount of alimony paid and ex-spouse's social security number
- Childcare records (including the provider's ID number) if applicable



INCOME / INVESTMENTS / RETIREMENT

- All forms that say W-2, 1098, 1099 or Schedule K-1
- Purchase date and total investment in any stocks or property you sold
- Expenses related to your investments
- Records of any contributions you made to IRAs, other retirement plans, and 529 plans or education savings accounts
- Records of business income and expenses if you are an independent contractor, self-employed, or own rental real estate



EDUCATION

- Education scholarships and fellowships
- Records of tuition and other higher education expenses, and Form 1098-T



ITEMIZED DEDUCTIONS

- Form 1098
- Mortgage interest, real estate and personal property tax records
- Prior years amount of state/local income tax paid (see hrblock.com if you have sales tax records for large purchases)
- Records of cash amounts donated to houses of worship, schools and other charitable organizations
- Records of non-cash charitable donations
- Employment-related expenses (dues, travel, publications, tools, uniform cost and cleaning)
- Job search/moving expenses, if applicable



HEALTH CARE

- Form 1095 -A if you enrolled in an insured plan through the Marketplace (Exchange)
- Marketplace exemption certificate if you applied for and received an exemption from the Marketplace (Exchange)
- Form 1095-B or Form 1095-C, if you have insurance through a private plan or employer plan
- HSA information (Forms 5498, 1099-SA) and receipts for medical expenses