



Personal Tax Document List

Your tax professional is only as good as the information you bring them. Use this list to help you gather your important personal, employment, residential and financial information needed to complete your tax return and take advantage of all possible deductions and credits.

Personal Information

- Copy of all drivers license or other state or government issued picture ID
- Copy of all social security cards
- Copy of death certificate(s) if applicable
- Copy of last year's tax return

Employment and Income Information

- W-2 forms for tax year
- Unemployment compensation 1099-G form
- Miscellaneous income including rent, 1099-MISC forms if applicable
- Partnership, S Corporation and trust income, Schedule K-1
- Pensions and annuities, 1099-R forms
- Social Security/RRR benefits, 1099-RRB forms
- Alimony received
- Jury Duty pay
- Gambling and lottery winnings
- Prizes and awards
- Scholarships and fellowships



- ___ Alimony paid to you, bring social security number of person paying alimony
- ___ State and local income tax refunds (if applicable), 1099-G forms

Home Owner and Renter Information

- ___ Residential address (es) for this year
- ___ Mortgage interest paid, form 1098 (all mortgages)
- ___ Sale of your home or other real estate, form 1099-S
- ___ Real estate taxes paid
- ___ Rent paid during tax year

Landlord Information

- ___ Residential address (es) for this year
- ___ Mortgage interest paid, form 1098 (all mortgages)
- ___ Real estate taxes paid
- ___ Rents received
- ___ Expense receipts, including utility bills, associated with rental property (ies)

Financial Assets Information

- ___ Interest income statement, 1099-INT and 1099-OID forms
- ___ Dividend income statements, 1099-DIV forms
- ___ Proceeds from broker transactions, 1099-B forms
- ___ Retirement plan distributions, 1099-R forms



Financial Liabilities Information

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

Expenses

- ___ Personal property tax information, including automobile registration
- ___ Gifts to charity (if a single donation is over \$250.00, need written statement from charity)
- ___ Unreimbursed expenses related to volunteer or charity work including mileage
- ___ Unreimbursed expenses related to your job (union dues, subscriptions, travel expenses, uniforms)
- ___ Investment expenses
- ___ Job hunting expenses
- ___ Job related education expenses
- ___ Child care expenses, child care provider name, address, and tax I.D (EIN or Social Security number)
- ___ Alimony paid, bring social security number of person receiving alimony
- ___ Tax return preparation fees

Self Employment Data

- ___ Business income, 1099-MISC form and/or own records
- ___ Partnership income, schedule K-1
- ___ Business related expenses, own records or receipts



- ___ Mileage log if not claiming actual
- ___ Farm related expenses, own records or receipts
- ___ Employment taxes and other business taxes paid during tax year, own records or receipts
- ___ Home office expenses if applicable, total square footage of home and office space, utility totals, repair and maintenance totals

Miscellaneous Tax Documents

- ___ Federal, state, and local (state and local if applicable) estimated income tax payments, estimated tax vouchers, cancelled checks, and other payment records
- ___ IRA, Keogh and other retirement plan contributions, if self-employed, identify if for self or for employees
- ___ Records to document medical expenses
- ___ Records to document casualty or theft losses
- ___ Records for any other revenue or sales of property that may be taxable or reportable
- ___ Records for any other expenditures that may be deductible
- ___ Purchase receipts showing Nevada sales tax amount paid (please total sales tax)