



Taxpayer Checklist for Personal Taxes

Courtesy of TaxRoute, A Division of HofflerSmith, Incorporated

Identification	<input type="checkbox"/> Social Security card(s) <input type="checkbox"/> Driver's License(s) <input type="checkbox"/> Dependent's Social Security Cards/Numbers and <input type="checkbox"/> Dates of Birth for Taxpayer, Spouse & Dependant (s)
Income	<input type="checkbox"/> State Refund Amount (from previous tax year) <input type="checkbox"/> W-2's <input type="checkbox"/> 1099 form(s), including income from: - Social Security - Unemployment - Pension &/or Retirement - Interest & Dividends
Child Care Expenses	<input type="checkbox"/> Employer ID# (EIN) or Social Security Number of the Day Care Provider <input type="checkbox"/> Address of Child Care Provider <input type="checkbox"/> Amount Paid to Child Care Provider
Self-Employment	<input type="checkbox"/> Business Expenses and Income (Please see our <i>Business Expenses Checklist</i> , if applicable)
Other Income	<input type="checkbox"/> Commissions <input type="checkbox"/> Sales of Stocks/Bonds <input type="checkbox"/> Lottery Winnings <input type="checkbox"/> Alimony <input type="checkbox"/> Retirement/401(k) Withdrawal
Education	<input type="checkbox"/> 1098 with Education Cost <input type="checkbox"/> 1098 with Student Loan Interest Paid <input type="checkbox"/> Job-related Education Expenses
Real Estate & Personal Property Taxes	<input type="checkbox"/> Mortgage Interest Statement (Form 1098) <input type="checkbox"/> Real Estate Taxes
Donations	<input type="checkbox"/> List Your Charitable Contributions (Cash and Non-Cash)
Job Related Expenses	<input type="checkbox"/> Un-reimbursed Employment— Job Related Expenses (i.e. Uniforms, scrubs, dry cleaning, fees for licenses, union dues, etc.)