Tax Advisors, LLC

(337) 988-9067

PERSONAL TAX PREP CHECKLIST

Personal Information

- Your social security number or tax ID number.
- Your spouse's full name and social security number or tax ID number.
- Your tax returns for the previous two years. Your Tax Professional can check them for accuracy.

Information about Other People Who May Belong on Your Return

- Dates of birth and social security numbers or tax ID numbers.
- Childcare records (including the provider's tax ID number) if applicable.
- Income of other adults in your home.
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable).

Education Payments

- 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.
- Forms 1099-Q for distributions from Educational Savings Account, Qualified Tuition Plan or 529 Plan (Louisiana START Account).
- Contributions to Educational Savings Account, Qualified Tuition Plan or 529 Plan (Louisiana START Account).

Employee Information

- Forms W-2

Retirement Income

- Pension/IRA/annuity income (1099-R).
- Social Security/Railroad Retirement Board income (1099-SSA, RRB-1099).

Savings and Investments

- Interest and Dividend income (1099-INT, 1099-OID, 1099-DIV).
- Income from sales of stock or other property (1099-B, 1099-S).
- Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B).
- Do you have any foreign or virtual currency accounts?
- Did you sale, exchange or purchase an interest in any virtual currencies?

Other Income

- Unemployment, state tax refund (1099-G).
- Gambling income (W-2G or records showing income, and any records showing gambling losses).
- Alimony received and ex-spouse's full name and social security number.
- Jury duty records.
- Hobby income and expenses.
- Prizes and awards.
- Other 1099misc.
- Form K1S and/or K1P (S Corp and/or Partnership Income prepared by another firm).

Affordable Care Act

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

Other Deductions and Credits

- Receipts for classroom expenses (for educators in grades K-12).
- Health Saving Account and long-term care reimbursements (1099-SA or 1099-LTC).
- Form 5498-SA showing HSA contributions.
- Forms 1098 or other mortgage interest statements.
- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid.
- Real estate and personal property tax records.
- Invoice showing amount of vehicle sales tax paid.
- Cash amounts donated to houses of worship, schools, other charitable organizations.
- Records of non-cash charitable donations.
- Amounts paid for healthcare insurance and to doctors, dentists, hospitals.
- Amounts of miles driven for charitable or medical purposes.
- Amount paid for preparation of last year's tax return.
- Receipts for energy-saving home improvements.
- Record of estimated tax payments made.
- Alimony paid and ex-spouse's full name and social security number.

IRA Information

- Form 5498 showing IRA contributions.
- Traditional IRA basis.

If you were affected by a 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

Farm/Rental/Business

- To report income/expenses for a (Farm/Rental/Business) use worksheets found on website.

NOTES: (Questions to ask our tax preparer)