



Eastwood

WEALTH

Tax Preparation Checklist

Please use the following list of items to prepare for filing your personal income tax return.

Personal Information

- 🍌 Dates of birth and Social Security numbers for you, your spouse, children and dependents
- 🍌 Bank account and routing numbers for electronic refund deposit
- 🍌 Prior year's income tax return

Tax Information

- 🍌 W-2 forms for wages, salaries, tips, etc.
- 🍌 1099s for interest, dividends, retirement, Social Security, state/local refunds, etc.
- 🍌 Rental property income and expenses
- 🍌 Schedule K-1 from partnerships, S corporations, estates and trusts
- 🍌 Statements reflecting mortgage interest, real estate and personal property taxes paid
- 🍌 Any charitable contributions and value of any donated property
- 🍌 Record of retirement plan contributions such as IRAs, SEP, SIMPLE and other self-employed pension plans
- 🍌 Statements reflecting investment transactions for securities such as stocks and bonds
- 🍌 Cost basis information on securities or property sold
- 🍌 Health insurance coverage Forms 1095-A, 1095-B and/or 1095-C
- 🍌 Medical and dental expense records
- 🍌 Documents supporting educational expenses, deductions or distributions including Forms 1098-T, 1098-E or 1099-Q
- 🍌 Alimony Paid
- 🍌 Legal documentation of adoption, divorce or separation involving custody of your dependent children
- 🍌 Closing statements regarding the sale or purchase of real property
- 🍌 Business expenses that have been incurred personally
- 🍌 Qualified energy efficient home improvements
- 🍌 Any tax notices sent to you by the IRS or other taxing authority
- 🍌 The contents of any envelope that has Important Tax Information or the like printed on the outside

Other

- 🍌 Estimated tax payments made during the year

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