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Tax Prep Checklist:

- Personal Information
- Copy of prior year filing
- Income/ Investments
- Education & Retirement
- Itemized Deductions
- Affordable Care Act

Personal Information [for you and anyone else listed on your tax return]

- SSN or ITIN, full dates and birthdates for everyone on your return
- Amount of alimony paid and ex-spouse's SSN for divorces before 2019
- Childcare records (including provider's name, ID number, and address)

Income / Investments

- W-2 Statements, 1098, 1099 forms from bank or broker, or Schedule K-1
- Purchase date of total investments in any stocks or property sold
- Expenses related to investments
- Summary of sales transactions during the year from your broker
- Details of loans taken out to finance purchase of investments or property
- Details of purchase or sale of property, including legal documents
- 1099R forms for pension benefits and social security received
- Self-employed business income and expenses

Education & Retirement

- Records of any contributions made to the IRAs, other retirement plans, and HSAs
- Records of tuition and other education expenses
- Education scholarships and fellowships
- Student Loan Interest – Form 1098-E

Itemized Deductions

- Mortgage Interest, real estate and personal property tax records
- Prior years amount of state/local income tax paid
- Records of cash amounts donated to houses of worship, schools and other charitable donations
- Employment-related expenses
- Job search/moving expenses

Other Items

- Form 1095-A if you enrolled in an insurance plan through the Federal or state Marketplace (Exchange)
- K-12 Educator Expenses for classroom expenses

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