



TAXQUEEN

TAX PREP CHECKLIST

Tax Year

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Personal Information

- ☐ Names and social security number of you and spouse
- ☐ Tax return for previous year
- ☐ Address, email and phone number
- ☐ Date of birth for you and your spouse
- ☐ Occupations

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- ☐ Dependent names, social security numbers and birth dates

Income Information

W-2 wages or 1099-Misc income

- ☐ Unemployment income, 1099-R, Social Security
Alimony paid or received, State refund from prior year
Gambling W-2G, Interest 1099-INT, Dividend
1099-DIV

Self Employment Information: Name of business

- ☐ 1099-Misc, K-1s, income records
- ☐ Expense records, industry of business, business address
- ☐ Asset info - % business use, cost, date placed in service, etc.
- ☐ Office in home info, if applicable
- ☐ Business use of auto - date placed in service, total mileage, business mileage
- ☐ If claiming actual expenses, gas, oil, maintenance costs, insurance, registration

Retirement contributions

- ☐ IRA contributions and amount - SEP, traditional, Roth

Education Expenses

- ☐ Tuition Form 1098-T
- ☐ Student Loan Info 1098-E

Investment Information

- ☐ Sale of stock or asset property

Itemized Deductions

- ☐ Medical Expenses
- ☐ Real Estate Property Taxes
- ☐ Mortgage Interest 1098
- ☐ Charitable Donations - Cash and Goods
- ☐ Closing statement from sale of home
- ☐ Bill of Sale for auto purchase
- ☐ Miles driven for medical or charity

Other Items, if applicable

- ☐ Self-employed health insurance
- ☐ Long term care premiums
- ☐ Child Care Expenses
- ☐ HSA Contributions

Rental Property Information

- ☐ Income and Expenses: days rented vs. personal use
- ☐ Rental improvements, repairs or assets incl. cost, date placed in service, etc.

Estimated Tax Payments

- ☐ State & Federal amount and dates paid

Did you want your refund direct deposited into a bank account?

Or any tax owed to be direct withdrawal?

- ☐ Name of Bank
- ☐ Routing number
- ☐ Account number

Any other information I should know?