

## Tax Prep Checklist

The quickest and easiest way to get through your taxes, no matter how you're doing them? Organize your paperwork before you get started.

Here's a list of everything you'll need to glide through your taxes this year. Not all documents will apply to everyone – so don't worry if there are some you don't have.

### Tax Year: 2017

- Last year's tax return
- Social Security numbers for you and all of your dependents
- W-2s (wage statements from your employers)
- Form 1099-G (for state tax refunds and unemployment benefits received)
- Form 1099-SSA (for Social Security benefits received)
- Form 1099-INT (for interest earned)
- Form 1099-DIV (for dividends earned)
- Form 1099-B (for brokerage sales transactions)
- Form 1099-R (for distributions from retirement accounts, pensions, and annuities)
- Form 1099-MISC (for other income, including freelance work, rents, royalties, and prizes)
- Form 1099-S (if you sold real estate)
- Form 1099-SA (if you used money from an HSA or MSA to pay medical expenses)
- Schedule K-1 (for pass-through income from partnerships and S corporations; and trust and estate beneficiaries)
- All business and/or rental income receipts (which may include Forms 1099-MISC)
- All business and/or rental expense receipts
- Form 1095-A (Health Insurance Marketplace Statement, if you got health insurance through the ACA)
- Form 1095-B or -C (if you had health insurance NOT through the ACA)
- Form 1098-T (for education costs)

- Form 1098-E (for student loan interest paid)
- Childcare records (if you paid for childcare; include provider's tax ID number)
- Estimated tax payment records (if you paid estimated taxes throughout the year)
- Record of all alimony paid or received
- Medical expenses paid (not including expenses paid through HSA, MSA, and FSA or expenses reimbursed by insurance)
- Form 1098 (mortgage interest statement)
- Charitable donation records and receipts
- Mileage logs (for volunteer work and medical travel)
- Records for job expenses (non-reimbursed expenses paid as an employee)
- Tax preparation fees (whether you paid a professional or for software)