

BookSmart, LLC

Bookkeeping & Accounting



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Taxpayer Checklist for Individuals

This is provided to help you by listing the most common items to consider when filing your personal tax return and to aid in organization of your information for us to prepare your return.

General Information

- Full name, Social Security Number for yourself, spouse, and dependents
- Date of Birth for yourself, spouse and dependents
- Voided Check (if electronic filing)
- Tax returns filed from the prior 3 years
- Payments of Estimated Federal, State, local taxes paid
- Presidential Election Fund Contributor Y/N

Income Information

- W-2s
- 1099 Interest and Dividend Income
- Retirement
- Annuities
- Tax refunds
- Unemployment
- Social Security received
- Alimony received
- Gambling income and losses
- Cost Basis of Securities Sold
- Rental Property Income

Tax Credit & Deduction Information

- Child Care Expenses
- 1098-T Education Tuition Expense
- Interest Paid on Student Loans
- Alimony Paid (need Social Security number of recipient)
- Medical savings account
- Moving expenses
- IRA contributions
- Rental Property Expense & cost basis
- Adoption expenses

Itemized Deductions (Schedule A)

- Medical Expenses (Health Care – Prescriptions, Doctors, Dentists, Eyeglasses, Medical Insurance, Long Term Health Care Insurance)
- 1098 – Mortgage Interest Expense
- Real Estate Taxes and other taxes paid
- List of Charitable Contributions

Other Expenses

- Un-reimbursed Job Expense
- Union/Professional Dues
- Job related educational costs
- Investment expenses
- Job search expense
- Hobby expense
- Work uniforms
- Safe deposit box
- Tax preparation fees