

SML Tax Prep, LLC

TAX PREPARATION CHECKLIST

Tax Year: _____

Personal Information

- ☐ Social Security Numbers for everyone on the return
- ☐ Drivers License Information
- ☐ Copy of last 2 years return (New Client Only)
- ☐ Bank Account Information
- ☐ DOB of everyone on the return (New Client Only)
- ☐ Proof of Residency for Dependents
(Document with the Dependent's Name and Your Home Address)

Income/Investments

- ☐ W-2's 1099's SSA-1099's 1098's Forms
- ☐ W-2G Gambling winnings
- ☐ Stock Investments
- ☐ IRA/401K Contributions
- ☐ Other Income and Benefits
- ☐ Interest and Dividends
- ☐ State Tax Refund From Last Year

Home

- ☐ 1098 Home Mortgage Interest
- ☐ Paid Real Estate Taxes
- ☐ Energy Efficient Receipts
- ☐ Closing Costs if Home Sold (Purchase and Sale)

Health Care

- ☐ Form 1095-A, 1095-B, 1095-C
- ☐ HSA Information
- ☐ Health Insurance, Supplemental Insurance
- ☐ Medical, Dental, Vision Expenses
- ☐ Medical Equipment

Your Business

- ☐ Tax ID
- ☐ Income/Expenses
- ☐ Capital Assets/Equipment
- ☐ Mileage Log
- ☐ Business and Health Insurance Premiums
- ☐ Estimated Federal and State Taxes

Other Deductions

- ☐ Child Care Credit
- ☐ Vehicle Purchase Sales Tax
- ☐ Childcare Expenses
- ☐ Paid State Income Tax Last Year
- ☐ Charitable Donations You Have Receipts For
- ☐ Education Expense (1098T, Teacher Class Expense)
- ☐ Mileage Logs for Medical and Charitable Activities

Rental Property

- ☐ Rental Income
- ☐ Real Estate Taxes Paid
- ☐ Receipts for Repairs, Inspections, etc.
- ☐ Mileage Logs for Repairs, Rent Collection, etc.
- ☐ Mortgage Interest
- ☐ Insurance Premiums

Misc.

- ☐ _____
- ☐ _____
- ☐ _____