

TIPS Tax & Financial Services

P.O. Box 1535
Corona, CA 92878
(951) 547-2744

Email: tipstaxservices@gmail.com

Website: www.tipstaxservices.com

This tax preparation checklist is a guide to help you get organized. Everything on this list may not pertain to you. Use the information that is most useful for your personal tax situation.

I need your date of birth, your driver's license number and expiration date, your social security, your spouse, and any dependents social security numbers.

Employment & Income

W-2 forms

Unemployment Compensation (Form 1099-G)

Miscellaneous Income, including Rent (Form 1099-MISC)

Pensions and Annuities (Forms 1099-R) Social Security/RR1 Benefits (Forms RRB-1099)

Alimony Received

Jury Duty Pay

Gambling and Lottery Winnings (Forms W-2G)

Prizes and Awards

Scholarships and Fellowships

State and Local Income Tax Refunds (Form 1099-G)

Personal Information

Social Security Numbers of All Family Members including Spouse and Children

Childcare Provider Information including Name, Address, and Tax identification number or Social Security Number

Name of Ex-spouse, the amount of any Alimony Paid and the Social Security Number of Ex-Spouse

Financial Assets

Interest Income Statements (Form 1099-INT & 1099-OID)

Dividend Income Statements (Form 1099-DIV)

Proceeds from Broker Transactions (Form 1099-B)

Retirement Plan Distribution (Form 1099-R)

Automobiles

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Personal property tax information

Registration Cost

Mileage Log

Gas Receipts

Cost of Auto Repairs

Financial Liabilities

Auto loans and leases if vehicle used for business - account numbers and car values

Student loan interest paid

Early withdrawal penalties on CDs and other time deposits

Homeowner/Renter Information

Residential address for the current tax year

Mortgage interest (Form 1098)

Sale of your home/real estate (Form 1099-S)

Interest on Second mortgage

Real Estate Taxes Paid

Rent Paid in 2018

Moving Expenses

Miscellaneous Tax Documents

Federal, state & local estimated income tax paid for current year include estimated tax vouchers, cancelled checks & personal payment records

IRA, and other retirement plan contributions

Records to Document Medical Expenses

Records to Document Casualty or Theft Losses

Records for any other Revenue or Sales of Property that may be Taxable or Reportable

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Personal/Business Expenses

Gifts to charity (qualified written statement from charity for any single donations in excess of \$250)

Non-reimbursed expenses related to volunteer work

Non-reimbursed expenses related to your job (travel expenses, uniforms, union dues, subscriptions)

Investment Expenses

Job-Hunting Expenses

Job-related Education Expenses

Child Care Expenses

Medical Savings Accounts (MSA)

Adoption Expenses

Alimony Paid

Tax Return Preparation Expenses and Fees from prior years

Self-Employment Data

Business Income (Form 1099-MISC and/or personal records)

Business-Related Expenses (receipts, other documents & personal records)

Employment Taxes & other Business Taxes paid for current year (personal records)