

Personal Tax Preparation Checklist

Our goal is to make your experience as simple as possible. Before you call JFCO to prepare your income tax return, go through the following checklist. Check the boxes that apply to your situation. Make sure to include those documents.

TAXPAYER NAME _____ SPOUSE NAME _____

PERSONAL INFORMATION AND INCOME

- Full legal name(s), date(s) of birth, Social Security number(s), driver's license(s), proof of health insurance, and last year's tax return.
- Stimulus Check amounts received (applicable for 2020 tax preparation)
- Wages and Self-Employment Income: W-2, 1099, and K-1
- Unemployment or State Refunds: Form 1099-G
- Investments or Interest Income: 1099-INT, 1099-DIV, 1099-B, Rental Income, Farming Income
- Home Sale: 1099-S
- Pension/IRA/Annuity Income: 1099-R
- Social Security/RRB Income: SSA-1099, RRB-1099
- HSA and Long-Term Care: Form 5498-SA, 1099-SA
- Miscellaneous Income: Jury Duty, Gambling Winnings, Alimony, etc.

ADJUSTMENTS TO YOUR INCOME

- All forms that say 1098
- For Teachers: Receipts for Expenses paid for Classroom Supplies
- Records for IRA Contributions
- Records for Medical Savings Account Contributions
- Self-Employed Health Insurance Payment Records
- Records for Moving Expenses (moves related to work)
- Alimony Paid
- Self-Employed Pension Plans (Keogh, SEP, SIMPLE)

COMMON DEDUCTIONS

- Business Expenses
- Child Care Costs: Provider's Name, Address, Tax ID #, and Amount Paid
- Education: Form 1098-T and all expenses related to education
- Adoption Costs and Records
- Homeowner Expenses: Mortgage Interest Form 1098, Real Estate Taxes
- Charitable Donations: Cash amounts, official charity receipts, value of donated property, miles driven, ect.
- Medical and Dental expense records

TAXES YOU PAID

- Estimated Federal and/or State Taxes

Any Other Documents that You May Find Pertinent to Your Tax Situation