<u>Tax Prep Checklist</u>

Personal Information
- Your social security number or tax ID number
- Your spouse's full name and social security number or tax ID number
- Amount of any alimony paid and ex-spouse's full name and social security number

Information Regarding Dependents
- Dates of birth and social security numbers or tax ID numbers
- Childcare records (including the provider's tax ID number) if applicable<l/i>
- Income of other adults in your home
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

Education Payments
- Forms 1098-T from educational institutions
- Receipts that itemize qualified educational expenses
- Records of any scholarships or fellowships you received Form1098-E if you paid student loan interest

Employee Information
- Forms W-2

Self-Employment Information
- Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s
- Records of all expenses — check registers or credit card statements, and receipts
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Office in home information, if applicable

Business Use of Vehicle Information
- Log showing total miles driven for the year (or beginning/ending odometer readings), total business miles driven for the year (other than commuting), and the business purpose of the mileage
- **<u>VEHICLE MILEAGE MUST BE BROKE DOWN DUE TO RATE CHANGES</u>**
  - **JAN-JUN (58.5 cents)**
  - **JUN-DEC (62.5 cents)**
- Amount of parking and tolls paid
- If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

Rental Property Income
- Records of income and expenses
- Rental asset information (cost, date placed in service, etc.) for depreciation

OVER⟶

Retirement Income
- Pension/IRA/annuity income (1099-R)
- Social security/RRB income (1099-SSA, RRB-1099)

Savings and Investments
- Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-S)
- Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)

Other Income
- Unemployment, state tax refund (1099-G)
- Gambling income (W-2G or records showing income, as well as expense records)
- Amount of any alimony received
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Any other 1099s
- **1099-K (VENMO)- NEW THIS YEAR**

Affordable Care Act
- Form 1095-A if you enrolled in an insured plan through the Marketplace (Exchange)
- Marketplace exemption certificate if you applied for and received an exemption from the Marketplace (Exchange)

Other Deductions and Credits
- Form 5498-SA showing HSA contributions
- Forms 1098 (Mortgage Statement)
- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Real estate and personal property tax records
- Invoice showing amount of vehicle sales tax paid
- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- Amounts of miles driven for charitable or medical purposes
- Expenses related to your investments
- Amount paid for preparation of last year's tax return
- Record of estimated tax payments made

Payment Options

1) Cash or check
2) Credit/debit card
3) Venmo @ kimstaxservicellc