****

**www.LamarTax.com**

**561-250-6311**

**BLamarTax@gmail.com**

Please take the time to reference this check list and make sure ALL your needed tax documents have been accounted for.

**Personal Information**

* Your social security number or tax ID number
* Your spouse's full name and social security number or tax ID number
* Full address
* Copy of Current Drivers License (For each Individual)
* Last Years Tax Return

**Dependent(S) Information**

* Dates of birth and social security numbers or tax ID numbers
* Childcare records (including the provider's tax ID number) if applicable
* 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)

**Sources Of Income**

**Employed**

* + Forms W-2

**Unemployed**

* + Unemployment, state tax refund (1099-G)

**Self-Employed**

* + 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
	+ Record of estimated tax payments made (Form 1040ES)

**Rental Income**

* + Records of income and expenses
	+ Rental asset information (cost, date placed in service, etc.) for depreciation
	+ Record of estimated tax payments made (Form 1040ES)

**Retirement Income**

* + Pension/IRA/annuity income (1099-R)
	+ Traditional IRA basis (i.e. amounts you contributed to the IRA that were already taxed)
	+ Social security/RRB income (1099-SSA, RRB-1099)

**Savings & Investments or Dividends**

* + 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)
	+ Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
	+ Expenses related to your investments
	+ Record of estimated tax payments made (Form 1040ES)

**Other Income & Losses**

* + Gambling income (W-2G or records showing income, as well as expense records)
	+ Jury duty records
	+ Hobby income and expenses
	+ Prizes and awards
	+ Trusts
	+ Royalty Income 1099 Misc.
	+ Any other 1099s received
	+ Record of alimony paid/received with Ex-spouse’s name and SSN

**Types Of Deductions**

**Home Ownership**

* + Forms 1098 or other mortgage interest statements
	+ Real estate and personal property tax records
	+ Receipts for energy-saving home improvements
	+ All other 1098 series forms

**Charitable Donations**

* + Cash amounts donated to houses of worship, schools, other charitable organizations
	+ Records of non-cash charitable donations
	+ Amounts of miles driven for charitable or medical purposes

**Medical Expenses**

* + Amounts paid for healthcare insurance and to doctors, dentists, hospitals

**Health Insurance**

* + Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)
	+ Form 1095-B and/or 1095-C if you had insurance coverage through any other source (i.e . an employer, insurance company, government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc.)
	+ Marketplace exemption certificate (ECN) if you applied for and received an exemption from the Marketplace (Exchange)

**Childcare Expenses**

* + Fees paid to a licensed day care center or family day care for care of an infant or preschooler.
	+ Wages paid to a baby-sitter.
	Don't include expenses paid through a flexible spending account at work.

**Educational Expenses**

* + 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

**Job Expenses & Tax Prep Fees**

* + Employment related vehicle expenses (tolls, mileage, gas, maintenance, license, property tax, interest expense, parking)
	+ Receipts for classroom expenses (for educators in grades K-12)
	+ Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
	+ Job-hunting expenses
	+ Record of moving expenses not reimbursed by employer
	+ Amount paid for preparation of last year’s tax return

**State & Local Taxes or Sales Tax**

* + Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
	+ Invoice showing amount of vehicle sales tax paid

**Retirement & Other Savings**

* + Form 5498-SA showing HSA contributions
	+ Form 5498 showing IRA contributions
	+ All other 5498 series forms (5498-QA, 5498-ESA)

**Federally Declared Disaster**

* + City/county you lived/worked/had property in
	+ Records to support property losses (appraisal, clean up costs, etc.)
	+ Records of rebuilding/repair costs
	+ Insurance reimbursements/claims to be paid
	+ FEMA assistance information
	+ Check FEMA site to see if my county has been declared a federal disaster area