

# Tax Prep Checklist

## Income

- W-2
- Investment Income (1099-INT, 1099-DIV, etc)
- State Tax Refund (1099-G)
- Rental Income
- Retirement Income
- HSA Reimbursement
- Other (Jury Duty, Gambling/Prizes, Alimony, etc)

## Deductions

- Mortgage Interest (1098)
- Property Taxes Paid
- Vehicle Taxes Paid
- Childcare Expenses (Including Provider Tax ID)
- Retirement Contributions
- Educational Expenses/Loan Interest
- Medical Expenses
- Energy Saving Home Improvements
- Charitable Donations

