

Tax Documents Checklist

Brought to you by Abracadabra Accounting



Personal info

- ☐ A Social Security or tax ID number for everyone included on your tax return
- ☐ Date of birth for everyone on your return



Income and investments

- ☐ Form W-2, Wage and Tax Statement
- ☐ Bank or financial institution statements
- ☐ Last year's state refund amount 
- ☐ Other miscellaneous income records
- ☐ Any Form 1099s
- ☐ Information about stocks that you traded or sold (Forms 8945 and 8949)



Retirement

- ☐ Retirement plan contributions and distributions
 - Form 5498: IRA Contributions Information
 - Forms 1099-R: Distributions From Pensions, Annuities, Retirement, etc.
- ☐ Form 1099-DIV
- ☐ Form 1099-INT



Charitable Donations

- ☐ Charitable donation receipts: must include the date, value, and charitable organization



Self-employment or gig records

- ☐ Business expense records
- ☐ Quarterly estimated tax payment receipts
- ☐ Mileage records
- ☐ Home office expenses 



Medical expense records

- ☐ Receipts for unreimbursed medical expenses
- ☐ Health insurance coverage forms (Form 1095s)
- ☐ Social Security benefits



Education

- ☐ Tuition and qualified expenses paid (Form 1098-T) 
- ☐ Student loan interest paid (Form 1098-E)



Homeownership info

- ☐ Property tax receipts
- ☐ Mortgage interest paid (Form 1098 Mortgage Interest Statement)



Federally Declared Disaster Records

- ☐ Damage documentation