STIFEL | Tax Form Preparation Checklist

Before you file your taxes, review the following list of items.
This checklist will aid you in gathering important documents that are generally needed in order to file your tax return.

Personal Information

- ☐ Social Security Numbers (SSN) for you, your spouse, and your dependents
- ☐ Birthdates for you, your spouse, and your dependents
- ☐ Prior year tax returns for you and your spouse
- ☐ Any estimated tax payments paid or applied for current year
- ☐ Bank account information, if directly depositing any refunds into your account

Income

- ☐ W-2s for you and your spouse
- ☐ 1099-INT, -DIV, -B, Consolidated 1099s, and K-1s
- ☐ 1099-G for state or local tax refunds or unemployment income
- ☐ Alimony received pursuant to a divorce decree (may not be taxable if received pursuant to divorce decree executed after December 31, 2018)
- ☐ 1099-MISC
- ☐ Business or farming income – profit/loss statement, capital equipment information
- ☐ 1099-S from sale of property
- ☐ 1099-R, Form 8606 for payments/distributions from IRA or retirement plans
- ☐ Rental property income/expenses – profit/loss statement, suspended loss information
- ☐ SSA-1099 for Social Security benefits received
- ☐ Miscellaneous income: jury duty, gambling winnings, prizes, awards, cancellation of debt income, etc.
- ☐ 1099-C forms for cancellation of debt
- ☐ Prior year installment sale information – Form 6252, principal and interest collected during the year, SSN, and address of payer

Adjustments to Total Income

- ☐ Educator expenses
- ☐ 1099-SA for health savings account information
- ☐ KEOGH, SEP, SIMPLE, and other self-employed pension plans
- ☐ Self-employed health insurance payment records
- ☐ Alimony paid and SSN of payee (may no longer be deductible if paid pursuant to divorce decree executed after December 31, 2018)
- ☐ Records of IRA contributions made during the year
- ☐ 1098-E for student loan interest paid (or loan statements for student loans)

Itemized Deductions

- ☐ Medical and dental expense records
- ☐ State and local income taxes paid or sales taxes paid
- ☐ Real estate taxes paid
- ☐ Personal property taxes paid
- ☐ 1098 – Mortgage interest paid, private mortgage insurance, and points you paid
- ☐ Closing statement if purchased or refinanced a home
- ☐ Investment interest expense
- ☐ Charitable donations, including acknowledgement letters from the charities
- ☐ Casualty losses attributable to a federally declared disaster

Tax Credits

- ☐ Foreign taxes paid – typically on consolidated 1099
- ☐ Childcare and dependent care expenses – provider's name, tax ID, and amount paid
- ☐ Adoption expense information
- ☐ Residential energy-efficient property receipts (solar, wind, geothermal, etc.)
- ☐ 1098-T for tuition paid and education expenses (also used for credits)

Stifel does not provide tax advice. You should consult with your tax advisor regarding your particular situation.