


Tax Preparation Checklist

INCOME	
	A copy of last year's tax return
	Social Security Numbers of you and your dependents
	W-2 Forms from Employers
	Child Care Costs including name, address and tax ID of provider
	Education Costs
	Adoption Costs and Receipts
	Social Security Benefits Information
	Unemployment Benefits Information
	W-2 from your Employer
	Investment Income Information
	State and Local Tax Refund Information
	Any Other Income Information
	Small Business Tax information
	
DEDUCTIONS	
	Medical and Dental Expenses
	Charitable Donations
	Receipts from State, Local, or Real Estate Taxes
	Home Mortgage Interest
	Job Expenses