



2022 Tax Season Checklist

TAXPAYER NAME:

PERSONAL INFORMATION:



Changes in marital status?

Changes in Dependents?

Change in Address?

Change in contact information – phone or email?

Change in Bank Account for refund (if applicable)?

SOURCES OF INCOME:



Employed

Form W-2

Unemployed

Form 1099-G

Self-employed

Forms 1099, Schedules K-1, income records to verify amounts not reported on 1099misc or 1099-NEC



- Record of all business-related expenses
- Home office information
- Record of estimated tax payments made

Rental Income

- Record of income and expenses
- If purchase or sale – transaction documents

Retirement Income

- Pension/IRA/Annuity income (Form 1099-R)
- Traditional IRA basis
- Social Security (Form SSA-1099)

Savings & Investments or Dividends

- Interest, dividend income (Form 1099-INT, 1099-DIV)
- Income from sales of stock or other property (Form 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 (HSA) and long-term care reimbursements
- Expenses related to investments
- Record of estimated tax (ES) payments (Form 1040-ES)
- Transactions involving cryptocurrency (Virtual currency)

Other income and losses

- Gambling income (W-2G or records showing income, as well as expense records)
- Jury duty records
- Hobby income and expenses
- Prizes and awards



- Trust income
- Royalty income (Form 1099-misc)
- Any other 1099s received
- State tax refund

TYPES OF DEDUCTIONS:

Home ownership

- Forms 1098 or other mortgage interest statements
- Real estate and personal property tax records
- Receipts for energy-savings home improvements (e.g., solar panels, solar water heater)
- All other 1098 series forms

Charitable Donations

- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Records of miles driven for charitable causes

Medical Expenses

- Amounts paid for healthcare, insurance and to doctors, dentists, hospitals and for medications

Health Insurance

- Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)

Childcare Expenses

- Fee paid to a licensed day care center or family day care for care of an infant or preschooler



- Amounts paid to a baby-sitter or provider of care for your child(ren) under age 13 while you work
- Expenses paid through a dependent care 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
- Form 1098-E if you paid student loan interest

K-12 Educator Expenses

- Receipts for classroom expenses (for educators in grades k-12)

State & Local Taxes

- Amount of state and local income or sales tax paid (other than wage withholding)
- Invoice showing amount of vehicle sales tax paid and/or personal property tax on vehicles

Retirement & Other Savings

- Form 5498-SA showing HAS contributions
- Form 5498 Showing IRA contributions
- All other 5498 series forms

Federally Declared Disaster

- City/county you lived in/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



2021 IRS Documentation (<https://www.irs.gov/payments/your-online-account>)

- Notice 1444-C Economic Impact Payment 3 (Stimulus Payment)
- Letter 6419 Advanced Child Tax Credit Payments

NOTES:



Please include any additional information which would be helpful in preparing your tax return -