Puzzled about getting things ready for tax season?
Step in 2 My Office!

Below is a list of information to gather as you prepare for tax season. Whether you choose to do your return yourself or to hire a tax professional, this should get you started on the right track!

First, start with the basics…

1) Gather Your Personal Information

- Your social security number or tax ID number
- Your spouse's full name and social security number or tax ID number
- Amount of any alimony paid and ex-spouse's full name and social security number
- Your tax returns for the previous three years. Your Tax Professional can check them for accuracy

2) Gather Any Information You Might Include for Others In Your Household or Who Might Be Included on Your Return

- Dates of birth and social security numbers or tax ID numbers
- Childcare records (including the provider's tax ID number), if applicable
- Income of other adults in your home
- Form 8332 showing that the child’s custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

Next, think about how you make your living…

3) Collect any and all Form W-2s reporting wages earned from employers

4) Self-Employed? Then you’ll need:

- Forms 1099-MISC, Schedules K-1, or other income records to verify amounts not reported on 1099s
- Records of all expenses — check registers or credit card statements, receipts, and mileage logs
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Office in home information, if applicable

5) Use Your Vehicle for Business? Be sure to gather:

- Your Mileage Log showing total miles driven for the year (or beginning/ending odometer readings), total business miles driven for the year (other than commuting), and the business purpose of the mileage
- Amount of parking and tolls paid (for business-related travel)

- Receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc. so that you can claim actual expenses (way better than estimating!)

6) Retired? Don't forget…

- Pension/IRA/annuity income (1099-R)
- Social security/RRB income (1099-SSA, RRB-1099)

Then there's other forms of income:

7) Rental Property Income

- Records of income and expenses
- Rental asset information (cost, date placed in service, etc.) for depreciation

8) Savings and Investments

- Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (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)

9) Other Income

- Unemployment, state tax refund (1099-G)
- Gambling income (W-2G or records showing income, as well as expense records)
- Amount of any alimony received
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Other 1099

10) IRA Information

- Form 5498 showing IRA contributions
- Traditional IRA basis

Finally, let's be sure you take advantage of any tax saving credits and deductions!

11) Education Expenses

- Forms 1098-T from educational institutions
- Receipts that itemize qualified educational expenses
- Records of any scholarships or fellowships you receivedForm1098-E if you paid student loan interest

12) Other Deductions and Credits

- Forms 1098-T from educational institutions
- Receipts for classroom expenses (for educators in grades K-12)
- Form 5498-SA showing HSA contributions
- Record of moving expenses not reimbursed by employer
- Forms 1098 or other mortgage interest statements
- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Real estate and personal property tax records
- Invoice showing amount of vehicle sales tax paid
- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- Amounts of miles driven for charitable or medical purposes
- Expenses related to your investments
- Amount paid for preparation of last year's tax return
- Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
- Job-hunting expenses
- Receipts for energy-saving home improvements
- Record of estimated tax payments made

13) Affected by a federally declared disaster? Make sure you have this information readily available:

- The city or county you lived, worked, and/or had property in
- Records to support property losses (appraisals, clean-up costs, etc.)
- Records of rebuilding/repair costs
- Insurance reimbursements/claims to be paid
- FEMA assistance information
- Check FEMA to see if your county or area has been declared a federal disaster area

One more thing…

Do both yourself and your tax preparer a favor and have your prior year's tax return handy. This will help in understanding changes in your tax refund and liability. If you're a new client and choose to **Step In 2 My Office** to prepare your return this year, we will analyze your prior year return to be sure we not only capture any and all tax saving strategies that are available to you this year, but to be sure you capitalized on them during the prior year as well. Backed by **good old-fashion honesty and integrity**, we're here to help!