



## Personal Tax Return Checklist

- Driver's Licenses for all parties
- Social Security Cards for all Parties
- Birth Certificates for all Parties
- Interest & dividends
- Form 6475
- W-2s
- 1099s
  - Print Paypal/Stripe/Square/venmo/cashapp. These don't get sent
- Bitcoin
  - Robinhood
- Unemployment – 1099G
- Student loans interest 1098E
  - Student Enrollment 1098T
- Capital gains/losses - Did you sell house, property, business, stock, cryptocurrency, inheritances?
- Charitable cash/non-cash donations
- New children in 2022?
- Childcare expenses
- Health care
- Gambling winnings W-2G
- Additional tax payments to the IRS or DOR? Need dates & amounts.
- Commute using the highway? Log into EZpass account and print 2022.
- Pay medical bills over 10% of income? Bring all medical receipts.
- House taxes
- House mortgage interest
- Vehicle excise taxes

**When in doubt, just bring it!**