

Checklist for Preparing Your Income Tax Return

Use the following detailed checklist to gather information for preparing your income tax return. Not every category will apply to you. Just pick the ones that do apply and make sure you have that information available.

Before You Start

Print this article. Check things off as you collect them, and enter information such as Social Security numbers and cash amounts. As you review the checklist, highlight information you will need for your return or make notes to remind yourself of additional items you may need later.

Personal Information

	Full Name	Social Security Number	Relationship	Date of Birth
Self				
Spouse				
Dependent				
Dependent				
Dependent				
Dependent				
Dependent				
Dependent				

Advance Child Tax Credit Payment

IRS notice announcing the amount of payment Amount Received \$ _____

Income Information

Income From Employment

W-2 Form for each employers for whom you and your spouse worked (list below)

<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Income from State & Local Income Tax Refunds

Form 1099-G from state or local governments Amount \$ _____

State income tax return from 2004 Amount \$ _____

City income tax return from 2004, if any Amount \$ _____

Unemployment Income

Form 1099-G – Unemployment compensation (or) Amount \$ _____

Unemployment check stubs and deposit records Amount \$ _____

Itemized Deductions

Form 1098 Home Mortgage Interest Amount \$ _____

Charitable Donations (Attach List) Amount \$ _____

Cash donations: Amount \$ _____

Charity receipts, or cancelled checks Amount \$ _____

Records of the mileage incurred for charitable purposes Amount \$ _____

