

Below is a list of standard IRS forms and documents that are typically used for preparing a tax return. Not all of these forms will necessarily apply to you.

Personal Data

- Social Security numbers (including spouse and children)
- Birth dates (including spouse and children)
- Child care provider: name, address and tax I.D. or Social Security number
- Alimony paid: Social Security number

Income Data

- W-2 wage forms for taxpayer and spouse
- Stock sales: Form 1099-B
- Unemployment income: Form 1099-G
- Interest income statements: Form 1099-INT
- Miscellaneous income including rent: 1099-MISC
- 401K, IRA and pension distributions: 1099-R
- Social Security benefits: Form RRB-1099
- Dividend income statements: Form 1099-DIV
- State and local income tax refunds: Form 1099-G
- Alimony received
- Jury duty pay
- Gambling and lottery winnings
- Prizes and awards
- Scholarships and fellowships

Homeowner and Rental Data

- Mortgage Interest Statement: Form 1098
- Sale of your home: Form 1099-S
- Real estate taxes paid

Expenses and Deductions

- 1098 T: Tuition payment statement
- 1098 E: Student loan interest paid
- Alimony paid
- Child care expenses
- Medical savings accounts
- Adoption expenses
- Property tax statements (winter and summer)
- License plate and registration fees
- Tax return preparation and fees from last year
- Early withdrawal penalties on CDs and other time deposits
- Gifts to charity including monetary donation, clothing, household items, etc.
- Job-related expenses that were not reimbursed including travel, uniforms, etc.

Notes:

Whether you're calculating your own return or having someone else do it, you'll be sure to have all the materials necessary with this checklist.