2015 Tax Checklist

- Names, SSN, DOB, and occupation for all listed on tax return
- 2014 Tax Returns (federal, state, & local)
- State & Local refunds and payments made in 2015 from the 2014 tax return
- Mortgage interest (1098), real estate taxes, points paid for buying or refinancing, settlement sheet from sale, purchase, or refinance
- Any other income – miscellaneous (1099-MISC), rental, gambling, jury, alimony, unemployment (1099-G), state tax refunds (1099-G), Social Security benefits (1099-SA)
- Self-employment income and expenses
- All interest, dividends, investment-related statements (1099-INT, 1099-OID, 1099-DIV, 1099-B)
- Distributions from retirement plans and pensions (1099-R)
- Any work related expenses – teachers, clothing, travel, tools, dues, publications
- Traditional/Roth IRA contributions
- Donations, charity, mileage
- Medical expenses, health insurance/LTC premiums paid
- Moved? – locality, dates, settlement sheet
- Childcare expense (tax ID for daycare provider)
- Education expense (1098-T)
- 529 distributions (1099-Q) and college expenses
- 529 contributions
- Estimated quarterly tax payments to the IRS or State made in 2015 (including January 2016 payment)
- Bank information for Direct Deposit
- Personal Energy Property – energy saving improvements