BURTON-LYMAN
Tax Service

TAX PREP CHECKLIST

A suggested checklist of items commonly needed to complete your taxes.

Personal Information:

- ❑ Completed Intake Form (if you have rentals or your own business—those intake forms)
- ❑ **Copy of last year's taxes** (if new client)
- ❑ Full names, SSN, birth dates for each person on your return
- ❑ Photo ID for you and your spouse
- ❑ Bank account information if you would like Direct Deposit

Income & Investments

- ❑ Any tax forms reporting income, such as W-2s any 1099s (ex. 1099-R, 1099-NEC, 1099-MISC) your Social Security (SSA-1099) and any Schedule K-1s
- ❑ Interest and Dividend Statements (ex. 1099-INT, 1099-DIV, 1099-B or consolidated statements)
- ❑ Income for work performed and compensation received not reported elsewhere
- ❑ Records of any other income and expenses (gambling, jury duty, alimony, rental)
- ❑ Unemployment income (1099-G)
- ❑ Cryptocurrency (bitcoin, etc.) This is treated like stocks (equities). If any is used, sold or received bring in information including dates and cost basis
- ❑ Records of contributions you made to any IRAs or retirement plans (especially if outside of work)

Household

- ❑ Mortgage Interest (Form 1098)
- ❑ Property Tax Statement
- ❑ Daycare information for your children (obtain record from the provider with Name, Address, Phone, SSN/EIN)
- ❑ Alimony paid or received, date of decree, and former's SSN
- ❑ Any energy improvement purchases such as solar
- ❑ Home Sale closing documents, if applicable (also any documented costs of improvements)

Healthcare

- ❑ HSA Forms 5498 and 1099-SA showing contributions and distributions form your account (you may have to log into your HSA account to retrieve these documents)
- ❑ Form 1095-A, if you are enrolled in Marketplace Insurance (see www.healthcare.gov)
- ❑ Total out of pocket medical and dental expenses (Must be over 7.5% of your total income so must be large amount to be deductible)
- ❑ Mileage driven for medical purposes

Education

- ❑ Amount of tuition and expenses paid for higher education, including books and supplies
- ❑ Higher education costs (must have 1098-T from institution)
- ❑ Student Loan Interest Statements
- ❑ Any My529 contributions or 1099-Q forms

Charitable Contributions

- ❑ Documentation of cash contributions to charity
- ❑ Itemized records of non-cash (Goodwill, DI, etc) donations (dates and amounts totaled before appointment)
- ❑ Mileage driven for charity
- ❑ Qualified Charitable Distribution amounts and letters, if applicable

Rental Properties

- ❑ Complete Rental Worksheet (Form B)
- ❑ Please total all receipts before your appointment
- ❑ Closing documents for any properties bought or sold during the year

Self-Employment

- ❑ Complete Self-Employment Worksheet (Form C)
- ❑ Please total all receipts before your appointment.

If you have any questions please call Burton-Lyman Tax Service at (801) 825-3901 or send us a message through the client portal at www.burton-lyman.com.