

Tax Preparation Checklist

- Form W-2 (all copies)
- Form 1099 (dividend and interest income)
- Form SSA-1099 (Social Security received)
- Social Security Numbers for all dependents to be claimed
- Birth dates of all dependents
- Form 1098 (mortgage interest)
- Real Estate and Personal Property tax bills
- Any notice received pertaining to commissions, pensions, annuities, etc.
- Any year-end interest or dividend statements
- Tax-exempt interest statements

