

Organizing your tax records not only makes tax preparation easier, it is essential in preparing for an audit. Supporting documents should be available at all times; such as bank statements, cancelled checks, credit card receipts and statements, and all other receipts and official information on income, losses, and deductions. This checklist can be your personal guide to compiling and organizing your tax documents and can save you time by reminding you which tax documents you've compiled throughout the year.

Personal Information	Notes:
Social Security Numbers for all family members	
Tax documents from previous year (copies of Federal & State returns)	
Personal Information	
W-2 forms	
Federal, State, Local Income Tax Refunds	
Unemployment compensation (Form 1099-G)	
Pensions & Annuities (Form 1099-R)	
Social Security Benefits (Form RRB-1099)	
Income from Partnership/Trust funds (Schedule K-1)	
Misc: Income from Jury duty, Business/Self-Employment, Real Estate/Rental, Prize money, Gambling and/or Lottery winnings, Alimony Received	
Interest & Dividend Income Statements (Form 1099)	
Retirement plan distribution (Form 1099-R)	
Homeowner/Renter Information	
Home Mortgage Interest/Rent you've paid (Form 1098)	
Sale of your home or other real estate (Form 1099-S)	
Second mortgage interest paid	
Real estate taxes paid	
Rent paid during tax year	
Moving expenses	
Expenses Paid	
Taxes - Real Estate, Personal Property, Social Security, IRA/Retirement Plans, Household Employment	
Auto loans/leases (if vehicle is used for business)	
Early withdrawal penalties on CD's and other time deposits	
Gifts to charity (cash & non-cash)	
Unreimbursed expenses related to volunteer work	
Unreimbursed expenses related to your job (travel, uniforms, dues, etc.)	
Investment expenses	
Medical Savings Accounts	
Misc: Medical / Dental Expenses, Alimony paid, Tax return preparation expenses and fees	
Other Tax Documents	
Federal, State and local estimated income tax paid for current year	
IRA, Keogh and other retirement plan contributions	
Records to document medical expenses	
Records to document casualty or theft losses	
Records for any other expenditures that may be deductible	
Records for any other revenue or sales of property that may be taxable or reportable	