THE NICKS GROUP
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Offering a full array of tax services to meet your needs

Tax Preparation Checklist

To help you facilitate the preparation of your state and/or federal taxes, The Nicks Group has developed a checklist that will help you in determining documentation that should be supplied to complete your specific tax forms. This is meant to be a comprehensive checklist. Some of the information below may not be applicable to the tax documents that you would like to file. If you have questions on what to submit, please contact **The Nicks Group** for assistance.

- ☐ Social Security Cards
- ☐ Driver's License
- ☐ Dependent's Social Security Numbers and Dates of Birth
- ☐ Last Year's Federal and State Tax Returns
- ☐ Wage Statement (Form W-2)
- ☐ Pension or Retirement Income (Form 1099-R)
- ☐ Interest and Dividend Income (Form 1099-INT/Form 1099-DIV)
- ☐ State Income Tax Refund Amount (Form 1099-G)
- ☐ Social Security Income (Form SSA-1099)
- ☐ Unemployment Income (Form 1099-G)
- ☐ Commission Received/Paid
- ☐ Information on sales of Stocks or Bonds (Form 1099-B)
- ☐ Self-Employed Business/Farm Income & Expenses (Form 1099-MISC)
- ☐ Lottery or Gambling Winnings (Form W-2G)
- ☐ Lottery or Gambling Losses
- ☐ Income and Expenses From Rentals
- ☐ Income from Partnerships, S Corporations, Trusts, and Estates (Schedule K-1)
- ☐ IRA Contributions
- ☐ Alimony Paid or Received
- ☐ Child Care Expenses & Provider Information
- ☐ Medical, Eye Care, and Dental Expenses
- ☐ Cash and Noncash Charitable Donations
- ☐ Record of Purchase or Sale of Residence
- ☐ Mortgage or Home Equity Loan Interest Paid (Form 1098)
- ☐ Real Estate and Personal Property Taxes Paid
- ☐ State or Local Sales Taxes Paid
- ☐ Unreimbursed Employment-Related Expenses
- ☐ Job-Related Educational Expenses
- ☐ Tuition and Education Fees (Form 1098-T)