



Simplex Tax Preparation Checklist

Forms

- Last year's tax return.
- Birthdays & Social Security Numbers for everyone that will be included on your tax return *i.e.: You, Spouse, and all dependents.*
- Your W-2, 1098, or 1099 forms.
- IRA or any other retirement plan statements.
- Current year mortgage and personal property tax statements.
- HUD statement for a home you purchased.

Income & Investments

- Income & expense records not already shown on a W-2 or 1099 *i.e.: rental income and expenses, jury duty, gambling, hobby, alimony income, etc.*
- Date of investments and stocks, or other property you purchased or sold along with related expenses.

Deductions and Expenses

- Student loan interest, childcare or higher education statements.
- Employment expenses *i.e.: mileage or travel, dues, uniforms or cleaning, etc.*
- Job search or HSA expenses.
- Moving expenses or alimony paid.

Donations Made to Charities

- Donations made to churches, schools, or other charities.
- Other non-cash charitable donations *i.e.: Goodwill, Kidney Foundation, etc.*
- Number of miles to and from charity organizations.