



CHAMBERLIN

EST. 2002

Personal Information

- Your name (exactly as it appears on your Social Security card)
- Date of birth
- Social Security number
- Home address
- Copy of the last 2 years' federal and state tax returns if you are new to Chamberlin
- Bank account number and routing number (for direct deposit of your refund)

Dependent Information

- Dependent's name (as it appears on their Social Security card)
- Date of birth
- Social Security number (or tax ID number)
- Form 8332 (if a child's custodial parent is releasing their right to claim the child as a dependent)

Income

- **Employment:**
 - W-2s from all employers
- **Investments:**
 - 1099-INT (interest income)
 - 1099-DIV (dividends)
 - 1099-B (stock sales and other investment transactions)
- **Retirement & Social Security:**
 - 1099-R (retirement plan distributions)
 - SSA-1099 (Social Security benefits)
- **Other Income:**
 - 1099-G (unemployment income, state/local tax refunds)
 - 1099-S (income from the sale of the property)
 - 1099-MISC (rental income, royalties, etc.)
 - 1099-Q (distributions from 529 plans or Coverdell ESAs)
 - 1099-SA (distributions from HSAs)
 - Schedule K-1 (income from pass-through businesses, trusts, or estates)
 - Alimony received (if an agreement is dated on or before December 31, 2018)
 - Cryptocurrency transaction records
 - Records of other income (gambling winnings, jury duty pay, cancellation of debt, etc.)

Deductions

- **Decide whether to take the standard deduction or itemize.**
- **If itemizing, gather documentation for:**
 - Medical expenses (exceeding AGI threshold)
 - State and local taxes (SALT)
 - Homeownership expenses (mortgage interest, insurance premiums, points, property taxes)
 - Charitable contributions
 - Casualty and theft losses
- **Gather documentation for adjustments to income, even if not itemizing:**
 - Form 1098-E (student loan interest)
 - Records of retirement contributions
 - Records of HSA contributions
 - Alimony paid (if an agreement is dated on or before December 31, 2018)
 - Educator expenses
 - Self-employed health insurance premiums

Tax Credits

- **Gather documentation for potential tax credits:**
 - Form 1098-T (education expenses)
 - Childcare costs and provider information
 - Adoption costs
 - Form 1095-A (health insurance through the Marketplace)
- **Other credits to explore:**
 - Earned Income Tax Credit (EITC)
 - Child and Dependent Care Credit
 - Retirement Savings Contributions Credit (Saver's Credit)
 - Residential Energy Credits
 - Clean Vehicle Tax Credit

Estimated Tax Payments

- If you made estimated tax payments, gather records of:
 - Payments made to the IRS and state/local tax authorities
 - Prior-year refunds applied to the current year
 - Amounts paid with an extension

Important Notes:

- **Organization is key:** Keep all your tax documents in one place.
- **Check things off:** Use this checklist to track your progress.
- **Keep records for at least 3 years:** The IRS can audit returns for up to 3 years after filing.

This comprehensive checklist helps you navigate the tax filing process smoothly!