

Small Business Alternatives Inc.
1909 West 8th Street
Erie, PA 16505
814-459-9055/telephone-814-454-5701/fax
info@sbaerie.com

TAX PREPARATION CHECKLIST – INDIVIDUALS:

- Income Forms:
 - W-2 – wages
 - W-2G – gambling income
 - 1099-INT - interest
 - 1099-DIV - dividends
 - 1099-B - proceeds from broker or barter transactions
 - 1099-R - pensions and IRA distributions
 - 1099-G – unemployment compensation
 - 1099-SSA – Social Security
 - 1099-NEC – Non-Employee Compensation
 - 1099-MISC – other income
 - Schedules K-1 from partnerships, S corporations, estates and trusts
 - All other income reporting statements, including all copies provided from the payer.
- Health Insurance Forms:
 - Form 1095-A for health insurance purchased through a Marketplace/public exchange
 - Form 1095-B for health insurance purchased outside of a public exchange
 - Form 1095-C for employer-provided health insurance coverage
- If you are a new client, a copy of last year’s tax returns.
- Copy of the closing statement(s) or HUD if you bought or sold real estate.
- Detail of estimated tax payments made to Federal, State, or Local.
- Income and deductions categorized on a separate sheet for business or rental activities.
 - Note: See “Tax Preparation Checklist – Businesses”
- Mileage figures for any business mileage being claimed.
- List of itemized deductions categorized on a separate sheet for medical, taxes, mortgage interest, property taxes, charitable donations, and other miscellaneous deductions.
- Copy of all acknowledgement letters received from charitable organizations for contributions made during the year.
- Other Adjustments/Deductions/Credits:
 - Health savings account (HSA) or flexible spending account (FSA) contributions
 - Traditional IRA, SEP, Simple IRA, or other qualified retirement plan contributions
 - Student loan interest deduction – Form 1098-E
 - Child Care and Dependent expenses:
 - Care provider name and address
 - Care provider EIN/SSN
 - Amount(s) paid to care provider
 - Tuition expenses paid for yourself or dependents; Provide Form 1098-T Tuition Statement for amount(s) paid
- Did you receive your 1st AND 2nd stimulus check(s)? If so, we need to know the EXACT amount received for each. If you did not receive please indicate on our intake form.