

# Tax Prep Checklist

| DOCUMENT                     | HAVE IT? | NOTES |
|------------------------------|----------|-------|
| W-2 / Income Statements      |          |       |
| 1099s                        |          |       |
| Mortgage Interest Statement  |          |       |
| Charitable Donation Receipts |          |       |
| Medical Expense Receipts     |          |       |
| Childcare Costs              |          |       |
| Business Expense Receipts    |          |       |
| Last Year's Return           |          |       |
| Other                        |          |       |