API Accounting Partners Inc.
Construction & Small Business Specialists

Tax Preparation Checklist

Below are some suggested forms and information that will be needed by your Tax Preparer to complete your Tax Returns. The more prepared you are the better prepared and accurate your tax return will be.

	Personal Information Needed
	Your Full Name, Date of Birth and Social Security Number
	Your Spouse's Full Name, Date of Birth and Social Security Number
	Your Dependents' Full Name, Date of Birth and Social Security Numbers
	Bank Routing Number
	Bank Account Number
	Health Insurance information (Insurance Cards or 1095) for all tax payers and dependents

	Income Information Needed
	W-2 Forms for all employers worked for during the past tax year
	1099 forms if you completed contract work and earned more than $600
	Investment Income (1099 forms received for Interest, Dividends and other Proceeds)
	Income from Local and State Tax refunds from the Prior Year (1099-G)
	Business Income and Expenses (Accounting Records for any business that you own)
	Unemployment Income
	Rental Property Income
	Social Security Benefits
	Retirement Account Distributions
	Miscellaneous Income (Jury Duty, Gambling Winnings, Form 1099-MSA for distributions from medical savings accounts

	Income Adjustments, Deductions and Credits Information Needed
	Home Energy Improvements
	IRA Contributions
	Mortgage Interest
	Property Tax Payments for Home and Vehicles
	Student Loan Interest & Education Expenses
	Medical Savings Account Contributions &/Or Self-Employed Health Insurance
	Moving Expenses
	Childcare Costs
	Adoption Costs
	Charitable Contributions/Donations
	Casualty and Theft Losses
	Medical Expenses
	Job Related Expenses