

What Do I Need to File?

Save time by getting organized before preparing your tax return. Use our checklist to help determine what info you'll need. You can even print it and check the boxes as you receive or gather the info.

You	Spouse	Dependents	Basic Info
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Name, SSN or ITIN, and date of birth
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Last Year's Return - hard copy or PDF file (TaxACT can import basic info from PDF's of returns prepared by select software solutions)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Estimated Taxes Paid
You	Spouse	Dependents	Documents Received
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form W-2s - wage and tax statements
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1098s - includes mortgage interest (1098) and student loan interest (1098-E)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1099s - includes dividend income (1099-DIV), interest income (1099-INT & 1099-OID), merchant card and third party network payments (1099-K), miscellaneous income (1099-MISC), retirement plan distribution (1099-R), sale of home or real estate (1099-S) and unemployment compensation (1099-G)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 2439s - notice to shareholder of undistributed long-term capital gains
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Schedule K-1s - partnership, S Corporation and trust income
You	Spouse	Dependents	Personal Records
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Child and Dependent Care Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Education Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Medical Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Vehicle (Personal Property) Taxes Paid
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Real Estate Taxes
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mortgage Interest Paid
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Charitable Contributions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Business or Employee Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Gambling Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Investment Transactions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Retirement Contributions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Foreign Earned Income and Foreign Taxes Paid
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Moving Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Energy Efficiency Property Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Household Employee Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Alimony Expenses and/or Income
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Expenses for miscellaneous itemized deductions
You	Spouse	Dependents	E-file/Print
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bank Information (Account and Routing Number for Direct Deposit/Withdrawal)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Prior year's Self-Select PIN or Prior year's AGI (Adjusted Gross Income)