Premier
TAX & ACCOUNTING SERVICES

2022 Personal Tax Preparation Checklist*

- ☐ Changes to name/address/email/phone.
- ☐ Changes to bank account information (for possible refunds).
- ☐ Changes to filing status or dependents (date of birth and Social Security card, if new).
- ☐ All income forms (W-2, 1099, 1099-G for state unemployment benefits, alimony, pensions, Social Security, gambling, etc.
- ☐ Payments/deductions for student loan interest, qualified college expenses, state & local taxes, HSA and IRA contributions, etc.
- ☐ Health insurance form 1095-A if using healthcare.gov.; amount of premiums paid from any other source.
- ☐ Estimated tax payment records (forms 1040-ES, 500-ES) with proof of payment.
- ☐ 2022 annual statements from all retirement accounts, brokerage accounts, annuities, etc.
- ☐ Income for any children or dependents.
- ☐ IRA withdrawals/proof of rollovers to a new account or Roth IRA, if used for qualified charitable donations, or return of RMD due to CARES act changes.
- ☐ Sales or purchases of real estate (closing documents on purchase or sale, plus receipts for any upgrades; if primary home for at least 2 years, only need closing documents on sale).

**This list not inclusive. If you have any questions, please contact us.*

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