



**BADGER STATE FINANCIAL SERVICES**  
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 262-432-1268  
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## Tax Preparation Checklist

You	Spouse	Dependents	Basic Information
<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
<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-2's - wage and tax statements
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1098's - includes mortgage interest (1098) and student loan interest (1098-E)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1099's - includes miscellaneous income (1099-MISC), interest income (1099-INT & 1099-OID), dividend income (1099-DIV), sale of home or real estate (1099-S), unemployment compensation (1099-G) and retirement plan distribution (1099-R)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 2439's - notice to shareholder of undistributed long-term capital gains
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Schedule K-1's - 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 Information
<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)