



# TAX CHECKLIST

## DOCUMENTS

- SOCIAL SECURITY NUMBERS FOR FAMILY MEMBERS
- EMPLOYER W2
- EMPLOYER PROVIDED HEALTH INSURANCE FORMS 1095-C, 1095B
- MORTGAGE INTEREST FORM 1098
- PROPERTY TAX BILL CURRENT YEAR
- DAYCARE RECEIPT
- INTEREST INCOME FORM 1099-INT
- DIVIDEND INCOME FORM 1099-DIV
- RETIREMENT STATEMENT FORM 5498
- STUDENT LOAN STATEMENT FORM 1098-T, 1098-E
- 
- 

## TASKS

- COMPLETE IRS FORM 1040
- COMPLETE VERMONT FORM IN-111
- SAVE TAX FORMS AND STATEMENTS ELECTRONICALLY
- SAVE TAX FORMS AND STATEMENTS IN FAMILY DOCUMENT BINDER