

Year-end 1040 Checklist

The following checklist will help you collect the documents you'll need to file your tax return.



- 3 years' tax returns** (*new client*). Maybe we can amend and save money.
- Social Security numbers and dates of birth** are needed for all taxpayers, spouses and dependents.
- W-2 Forms**.
- Your last paycheck stub of the year** is full of important information.
- 1099 Forms for interest, dividends, retirement, Social Security, debt cancellation, and unemployment** need to be entered correctly to comply with the IRS matching program. If you received 1099-K s for income paid by credit card or internet, please bring them.
- Property tax statements** contain important information. They list the tax (deductible) and special assessments (not deductible).
- Forms 1098 for mortgage interest** need to be entered as printed. The IRS cross checks.
- Year-end statements from mutual funds** showing the transaction detail for the year.
- Purchase and sale information**, including dates, relating to anything sold during the year is needed.
- Child care provider information** (name, address, SS#, amount paid) is needed for the child care credit (*even if you are reimbursed at work*).
- Names, addresses, and Social Security numbers** from whom you received interest, or to whom you paid interest.
- Bankruptcy or divorce papers** (if applicable).
- If you paid an individual person \$600 or more for services rendered in connection with your business**, please provide their name, address, and Social Security number.
- Records showing income and expense for any small business or rental property you own** will be needed.
- If you have an investment in a Partnership, S Corporation, Estate or Trust** you will need to bring Form K-1.
- Bring IRA year-end statements.**
- Bring all other statements of income**, whether you think they are taxable or not.
- Forms 1098-T** and amounts paid for post-secondary tuition are needed.
- Bring your records of estimated taxes paid.**
- Student loan interest 1098.**
- Adoption costs** (if applicable).
- Form 1098-C for donations of automobiles or boats.**
- Details on all noncash donations greater than \$500.** Include date, place, fair market value, and original cost.
- Bring a list of receipted contributions of cash.**
- Volunteer expenses and mileage** are deductible if you itemize. Bring documentation.
- Bring direct deposit information** for any refunds you expect to receive.
- Noncustodial parents claiming children** need a signed IRS Form 8332 to claim the child.
- If your mortgage was forgiven due to foreclosure**, bring Form 1099-C or 1099-A.
- If you bought a new home**, bring the purchase papers.
- If you purchased a vehicle, boat, or airplane**, bring evidence of the sales tax paid.
- Information on energy saving home improvements** might get you a tax credit.
- If you were an investor caught in a Ponzi-type scheme**, bring the details.
- Out of pocket medical expenses may be deductible (if large).** Bring details.