

Individual Tax Checklist

PERSONAL DATA

- Social Security Cards: include spouse & children
- Driver's License or state I.D.
- Last 3 years tax returns: New Clients Only
- Banking information for direct deposit of refunds

EMPLOYMENT & INCOME DATA

- W-2 forms for this year
- Unemployment compensation: Form 1099-G
- Miscellaneous income including rent:
Forms 1099-MISC
- Partnership, S Corporation & Trust income:
Schedule K-1
- Pension & annuities: Form 1099-R
- Social Security/ARI benefits: Form RR8-1099
- Alimony Received
- Jury Duty pay
- State & local income tax refunds - Form 1099-G
- Cancellation of Debt: Form 1099-C
- Dividend income statements: Form 1099-DIV
- Proceeds from broker transactions: Form 1099-B
- Retirement plan distribution: Form 1099-R
- Interest income statements: Form 1099-INT
& 1099-DID

SELF EMPLOYMENT DATA

- Business income:
Form 1099-MISC and/or own records
- Partnership SE income: Schedule K-1
- Business related expenses: Receipts & records
- Auto mileage and/or expenses: Maintenance,
repairs, gas, insurance, car washes, etc.
- Auto loans & leases: Purchase agreement
- Employment taxes & other business taxes paid

EXPENSES

- Gifts to charity: Bring receipts non-cash & cash
- Unreimbursed expenses related to volunteering
- College Tuition: Form 1098-T
- Qualified Education Expenses:
 - Books, supplies, equipment
- Childcare & adoption expenses:
Name of provider, address &
Tax I.D. or Social Security Number
- Health savings accounts
- Alimony paid:
Recipient Social Security Number
- Vehicle registration fees
- Records to document medical expenses

HOMEOWNER/RENTER DATA

- Mortgage interest: Form 1098
- Sale of your home or other real estate
Form 1099-S
- Second mortgage interest paid:
Motor home, boat loan interest
- Real estate taxes paid: Property tax statements
- Rent paid/Landlords name & address

MISCELLANEOUS TAX DOCUMENTS

- Federal, state & local estimated income tax
paid for current year: Estimated tax vouchers,
cancelled checks & other payment records
- Records for any other expenditures that
may be deductible
- Student loan interest paid: Form 1098-E
- Proof of health insurance
- Legal documents for divorce decrees