Hoheisel Tax & Accounting Services
320-468-2396

Checklist

This check list is provided to help you gather the necessary information for us to prepare your income tax return.

- **NEW CLIENTS: Copy of your prior year tax returns (1-2 years)**
- Driver's License & Social Security Card (For Identity Verification)
- W-2 Wages
- Any notices received from the IRS, state, city, or other government agency including IP PIN Notices (CP01A)
- 1099 (Interest, Dividends, Stock Sales, Real Estate Sales, and Misc./Gambling Income)
- 1099 (Pension and IRA Distributions)
- 1099 (Unemployment Compensation)
- 1099 – B (Brokerage Statements)
- K-1 (Partnerships, S-Corporations, Estates, and Trusts)
- 1098 (Interest Paid on Mortgages and Equity Loans)
- 1098-E (Interest Paid on Student Loans)
- 1098-T (Tuition Payments) and related education expenses
- SSA 1099 (Social Security Benefits Received)
- RRB 1099 (Railroad Retirement Benefits Received)
- Cryptocurrency Sales and/or Earnings
- Business/Rental/Farm Income and Expenses
- Record of Estimated Taxes Paid into Federal and State
- Health Insurance Statements (1095-A, 1095-B, 1095-C) and HSA forms (1099-SA & 5498-SA
- Cancellation of Debt Statements
- Educator Classroom Expenses
- Charitable Contributions
- Child Care Expenses
- Purchase & Sale Records for Any Sold Assets (Home, Rental Property, Stocks, Etc.)
- Bank Account & Routing Number (For Refunds/Payments) (Voided Check)
- Amounts of any prizes, awards, winnings, jury duty pay, hobby income, etc.
- Amount of alimony paid or received with name and social security number of related party.
- Any other information you think may be helpful or required; Any questions you may have.