

Checklist

320-468-2396

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)**
- ☐ Name, Address, Date of Birth, Social Security Card, & Driver's License (if applicable) (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 (1099C)
- ☐ Educator Classroom Expenses
- ☐ Charitable Contributions
- ☐ Child Care Expenses- W2 or statement from provider including their name, address, and EIN or SS#
- ☐ 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.