

1040 Individual Income Tax Return Checklist

Income Received

- W-2s
- 1099s: Non-employee income, gambling winnings; dividend or interest earned (1099-DIV, 1099-INT)

Expenses, Deductions

- | | |
|---|--|
| <input type="checkbox"/> Charitable Contributions* | <input type="checkbox"/> Medical Expenses* |
| <input type="checkbox"/> Child and Dependent Care Expenses | <input type="checkbox"/> Mortgage Interest Paid (primary home)* |
| <input type="checkbox"/> Education Expenses (Tuition, student loan interest paid) | <input type="checkbox"/> Real Estate Taxes (primary home)* |
| <input type="checkbox"/> Energy Efficient Property Expenses** | <input type="checkbox"/> Rental Property Income and Expenses |
| <input type="checkbox"/> Expenses for miscellaneous itemized deductions* | <input type="checkbox"/> Retirement Contributions [after-tax; traditional or SEP IRA, solo 401(K); <i>excludes Roth IRAs</i>] |
| <input type="checkbox"/> Gambling Expenses | <input type="checkbox"/> Vehicle Taxes Paid (sales tax and property tax)* |
| <input type="checkbox"/> Investment Transactions | |

Self-employed

- | | |
|---|---|
| <input type="checkbox"/> Advertising, marketing, printing | <input type="checkbox"/> Utilities (phone, internet, web hosting) |
| <input type="checkbox"/> Cost of goods sold | <input type="checkbox"/> Vehicle mileage |
| <input type="checkbox"/> Home office expenses | <input type="checkbox"/> Wages paid to subcontractors (1099s) |
| <input type="checkbox"/> Income (1099s, checkbook register) | |
| <input type="checkbox"/> Rent paid | |
| <input type="checkbox"/> Supplies, equipment | |

Rental Properties

- Rental income and expenses (consult with us for details)

Other

- Photocopy of IDs

*For itemized returns on Schedule A; itemize if deductions exceed the standard deduction for 2023:
 \$27,700 (married filing jointly, or qualifying widow/er)
 \$13,850 (single or married filing separately)
 \$20,800 (head of household)

** Tax credits available for green energy home improvements and certain e-vehicles.

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