



TAX RETURN CHECKLIST



YOUR TAX RETURN CAN BE DONE MORE ACCURATELY AND EFFICIENTLY BY PROVIDING ALL OF THE APPLICABLE INFORMATION

PERSONAL INFORMATION

- Social Security Card (s)
- Driver's License (s)
- Dependents' Social Security Numbers and Dates of Birth
- Copy of Last Year's Federal & State Returns (New Clients Only)

INCOME FORMS

- W-2 Wages (Overtime pay for years **2025 – 2028** provide last paystub)
- SSA-1099 Social Security Income
- 1099-R Pension or Retirement Distributions
- 1099-INT or 1099-DIV Interest & Dividends statements
- 1099-B Sales of Stock or Bonds
- 1099-G State Income Tax Refund or Unemployment
- 1099-MISC Self-Employment Income from Business or Farms along with associated Expenses
- 1099-C Cancellation of Debt
- 1099-SA Distributions from Health Savings Account (HSA)
- Rental Income & Expenses
- W-2G Gambling / Lottery Winnings
- Alimony Paid / Received
- Commissions Received
- Schedule K-1 Partnership / S Corporation / Trust / Estates
- Other Income

PERSONAL EXPENSE / DEDUCTIONS

- Estimated Tax Payments to Federal and/or State
- 1095-A, B or C Healthcare Information
- 1098 Mortgage Interest Statement
- Real Estate / Personal Property Taxes Paid
- Medical / Eye / Dental Expenses
- Charitable Contributions Cash & Non Cash
- Childcare Expenses / Provider Address & ID#
- Information regarding Sale / Purchase of Home
- State & Local Sales Tax Paid
- Education Expenses (Work Related or 1098-T from Students College)
- 1098-E Student Loan Interest
- IRA Contributions (Traditional or ROTH)
- Unreimbursed Employee Expenses
- Gambling Losses to the Extent of Winnings
- Foreign Taxes Paid
- Personal automobile assembled in USA purchased in years **2025-2028**. Provide VIN# along with Loan Interest