

1040 Individual Tax Return – Document Checklist

Use this checklist to gather all documents needed to prepare your individual federal tax return (Form 1040). Not all items apply to every taxpayer.

Personal Information

- ☐ Photo ID (driver's license or government-issued ID)
- ☐ Social Security card or ITIN letter for you, your spouse, and dependents
- ☐ Date of birth for all taxpayers and dependents

Filing Status & Dependents

- ☐ Marital status as of December 31
- ☐ Dependent information (names, SSNs, relationship, months lived with you)
- ☐ Childcare provider name, address, and EIN/SSN (if applicable)

Income Documents

Employment Income

- ☐ Form W-2 (all employers)

Investment & Retirement Income

- ☐ Form 1099-INT (interest)
- ☐ Form 1099-DIV (dividends)
- ☐ Form 1099-B (brokerage transactions)
- ☐ Retirement income (1099-R, SSA-1099)
- ☐ K-1s (Partnerships, S-Corps, Trusts)

Other Income

- ☐ Unemployment income (1099-G)
- ☐ Rental income records
- ☐ Alimony received (pre-2019 agreements)
- ☐ Gambling winnings (W-2G)
- ☐ Other taxable income

Adjustments & Deductions

Education

- ☐ Form 1098-T (tuition)
- ☐ Student loan interest (1098-E)
- ☐ Education expense receipts

Homeownership

- ☐ Mortgage interest (Form 1098)
- ☐ Property tax statements

- ☐ Purchase or sale closing statements

Medical & Insurance

- ☐ Health insurance forms (1095-A, B, or C)
- ☐ Medical and dental expense records

Charitable Contributions

- ☐ Cash donation receipts
- ☐ Non-cash donation records

Retirement & Savings

- ☐ IRA contribution statements
- ☐ HSA contributions and distributions (Form 5498, 1099-SA)

Tax Credits

- ☐ Child and Dependent Care expenses
- ☐ Adoption expenses
- ☐ Energy-efficient home improvement receipts

Prior-Year Information

- ☐ Copy of prior-year tax return (federal and state)
- ☐ Estimated tax payment records

Other

- ☐ IRS notices or letters received during the year
- ☐ Identity Protection PIN (if issued)
- ☐ Any additional information relevant to your tax situation

Providing complete and accurate documents helps ensure your return is prepared correctly and efficiently.