

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.