

Year End 1040 Checklist (You may not have all of the following.)

- New Address, telephone number or email
- Family changes – new spouse, new children, children that have moved out, etc.
- Adoption costs (if applicable)
- Divorce/Separation papers (if applicable)
- Social Security numbers and dates of birth for taxpayers, spouses and dependents
- Record of estimated taxes paid both federal and state – please list date, amount paid, to whom
- W-2 Forms
- 1099 Forms – interest, dividends, retirement/pension, Social Security, debt cancellation and unemployment
- K-1's – partnerships, S corporations, LLC's, LLP's, estates, trusts, etc.
- Records showing income and expense for any small business or rental property you own (All Schedule C Income)
- Year end investment account statements
- Closing Statement – all real estate deals for buying or selling, including refinancing
- Form 1098 – Mortgage Interest Statement/2nd home records
- Property tax statements
- Child Care Cost – amount paid, name, address and social security number or tax ID of provider
- 1098-T Forms and amounts paid for post-secondary tuition
- Student loan interest
- 529 Plan Contributions – New York State plans
- Form 1095-A, 1095-B, 1095-C (Health Care Coverage) or Health Care Exemption Certificate
- Health insurance premiums
- Long Term Care Insurance premiums – listed by person
- Information on energy saving home improvement
- Sales Tax amounts on any large purchases (vehicle, boat, RV)
- Charitable Contributions – list of donations as well as noncash items. Don't forget volunteer work mileage and volunteer expenses – if applicable. *We do not need all the receipts just a list of all the contributions totaled.*
- Contributions/Withdrawals to/from Medical Savings Account, Health Savings Account, IRA's, SEP's, SIMPLE, KEOGH's, 401K's
- Total of out of pocket medical excluding health insurance premiums – don't forget mileage and lodging. *We do not need all the receipts just a list of all the payments totaled.*
- Did your bank change this year?* **Updated Bank Account Information** for direct deposit of your refund. Please include bank name, bank routing number, bank account number and what type of account (checking or savings).