<u>Year End 1040 Checklist</u> (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)

☐ Alimony received or paid (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 (Sch C) or rental property (Sch E) you own (Ask for our separate worksheet which shows information needed for small business or rentals or go to our website to print out.)

☐ 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 (College)

☐ 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. *<u>We do not need all the receipts just a list of all the contributions totaled. See attached worksheet.</u>*

☐ 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. *<u>We do not need all the receipts just a list of all the payments totaled. See attached worksheet.</u>*

☐ *Did your bank change this year?* **Updated Bank Account Information** for direct deposit of your refund. Please fill out the attached Bank Account verification Form.