Year-End 1040 Checklist

The following checklist will help you collect the documents needed to file your tax return.

- Your last 3 years' tax returns (new clients only).
- Social Security numbers and dates of birth for taxpayers, spouses and dependents.
- Copy of Driver's License for taxpayer and spouse.
- Noncustodial parents claiming children need a signed IRS Form 8332.
- W-2 Forms.
- Your last paycheck stub of the year (for each job).
- IP PIN for current year. The IRS sends notice CP01A by mail if identity theft is suspected.
- 1099 Forms for interest, dividends, sales, retirement, Social Security, self-employment, unemployment, etc.
- New home purchase settlement statements/HUD 1 document.
- Forms 1098 for mortgage interest.
- Foreign accounts. Such assets must be disclosed even if they do not generate income.
- If you bought, sold, or refinanced a home bring the settlement statement.
- Stock options & ESPPs. Form 1099-B and supplemental statements showing "ordinary" income reported on form W-2.
- Cryptocurrency. Bring details including dates, proceeds, and original cost.
- Forms W2-G for gambling winnings. Bring a log of gambling sessions (if available).
- Child care provider information (name, address, tax ID#, amount paid).
- Names, addresses, and Social Security numbers from whom you received interest, or to whom you paid interest.
- Bankruptcy or divorce papers (if applicable).
- Alimony paid or received for divorces executed before 1/1/19.
- If you paid an individual $600 or more for services in connection with your business, provide their name, address, and tax ID#.
- Records showing income and expense for business and/or rental property.
- Records of mileage for business and/or medical mileage or charitable donations.
- Form K-1 if you have an interest in a Partnership, S-Corporation, Estate or Trust.
- IRA (traditional, Roth, SEP, Simple) year-end statements.
- Bring details for all income, whether or not you think it's taxable.
- Forms 1098-T for post-secondary tuition payments.
- Forms 1099-Q for education savings plan distributions.
- Student loan interest form 1098-E.
- Estimated taxes paid (include amount and date).
- Adoption costs. Also bring the legal adoption documents.
- Charitable donations. Bring receipts and documentation for cash and non-cash contributions.

- Qualified Charitable Distributions from an IRA. Provide documentation.
- Form 1098-C for donations of automobiles or boats.
- New auto purchase document (new autos only not used).
- Purchase documents of electric vehicle purchased before Sept 30, 2025.
- If you installed solar, wind, geothermal, EV charging station, or fuel-cell systems bring receipts and details.
- If you installed an energy efficient improvement (insulation, windows, doors, etc.), bring receipts and details.
- If debts were forgiven, bring Form 1099-C or 1099-A.
- Forms 1099-K for internet or credit card income.
- Health Savings Account (HSA) contributions and distributions.
- Form 1095-A for health insurance purchased on healthcare.gov or your state marketplace.
- Out of pocket medical expenses (if large). Bring details.
- Form 1099-LTC for long-term care policy benefits paid.
- Bring a voided check for direct deposit of any refunds you expect to receive.