

4M Tax & Financial Services

Personal Tax Return Checklist

- Copy of prior years' return if we did not prepare your last return (prior 2 years preferred)
- Amount of alimony paid by you
- Amount of alimony received by you
- Social security numbers and dates of birth for all individuals living with you
- W-2's for all individuals living with you
- W-2G (gambling proceeds)
- Form 5498 (contributions made to an IRA)
- 1099's issued for all individuals living with you; some common examples include:
 - 1099-INT (interest income, usually issued by your bank)
 - 1099-DIV (income from stock dividends)
 - 1099-R (retirement income received, from a pension, IRA, etc.)
 - 1099-B, 1099-S (proceeds from the sale of investments, such as stocks, bonds, etc.)
 - 1099-SSA (social security income)
 - 1099-C (cancellation of debt, most issued by a credit card or mortgage company)
 - 1099-G (generally issued when collecting unemployment but can be any funds received by a governmental agency)
 - 1099-SA (distributions from a health savings account)
 - 1099-LTC (long-term care reimbursement)
 - 1099-MISC/1099-NEC (miscellaneous income, commonly issued for work done as an independent contractor)
 - Any other 1099's received
- Any K-1's received (received from partnerships, s-corporations showing your tax liability in that company)
- Documentation for any investments sold that indicate original cost, date of acquisition, selling price, and date sold
- Any education expenses (1098-T, 1098-E, receipts for textbooks, etc.)

- Any childcare expenses (with documentation from childcare providers)
- Rental property income, expenses, and property information (cost, rental start dates, etc.)
- 1095-A if enrolled in health care through the Marketplace
- If you are itemizing any deductions, please provide the following:
 - Mortgage interest statement (1098) for each residence owned
 - Property tax receipt paid for each residence owned (can be obtained from county tax collector website)
 - Documentation showing homeowner's insurance premiums paid
 - Medical expense receipts (to include pharmacy, vision, dentist, lab, doctor, etc.)
 - Charitable donation receipts (both cash and non-cash)
 - Sales tax on any vehicle purchased (paperwork from purchase)
 - Receipts for any reasonable work-related deduction (uniform cleaning, vehicle mileage/expenses, parking, tolls, etc.)

This is a general guideline of what may be needed for individual taxes. There may be instances where more complex returns may warrant additional information