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INDIVIDUAL TAX RETURN CHECKLIST-*For your reference only, do not return to us*

Please note that it is not necessary to wait until you have 100% of your tax data in hand; it is best to provide it early, and then we can provide you with a list of missing items.

- ☐ Form W-2 for wages and salaries
- ☐ Form 1099-INT for bank interest
- ☐ Form 1099-DIV for stock dividends
  - Tax-exempt interest and dividends; including any % or amount exempt from state tax
- ☐ Form 1099-G for state income tax refunds and unemployment
- ☐ Form 1099-MISC or 1099-NEC for self-employment and other miscellaneous income
- ☐ Form 1099-R for pension and IRA distributions
- ☐ Form 1099-SSA Social Security benefit statement
- ☐ Form 1099-B from brokerage for sales of stocks, mutual funds or bonds. Please make sure any cost basis and date of purchase is included.
- ☐ Form 1095-**A only Health Insurance Marketplace Statement**
- ☐ Form 1099-K Payment Card and Third Party Network Transactions
- ☐ Form 1098-T for college or vocational school tuition and fees and itemized list of payments made to the school during the calendar year
- ☐ Information about business income and expenses
- ☐ Rent and royalty income and expenses
- ☐ Schedule K-1; income/loss from partnerships, S-corporations, trusts and/or estates
- ☐ Alimony paid or received
- ☐ Contributions to IRAs, SEPs or other retirement accounts
- ☐ Any other income, ***such as jury duty, gambling winnings or other taxable income***
- ☐ Form 1098 (mortgage interest) and property tax statements (***actual amount paid in 2023)***
- ☐ Closing statements pertaining to real estate transactions (purchase, sale, refinancing) or home equity loan information
- ☐ Sales tax paid on large purchases such as an automobile
- ☐ **List *** of medical and dental expenses ***(including health insurance premiums, long-term care premiums, doctors' fees, prescription expenses, mileage)***
- ☐ **List *** of cash or non-cash contributions; for non cash also include the date, name, and address of the organization, description, and value. ***The Salvation Army on-line valuation guide can assist you in determining the value of items donated***
- ☐ **List *** of unreimbursed business expenses **(such as mileage other than to and from work, telephone, office expenses, and educator expenses)**
- ☐ **List *** of other miscellaneous expenses (***such as investment advisory fees, union/professional dues and subscriptions, safe deposit box)***
- ☐ Childcare expenses including provider's name, address, Federal ID # and amount paid
- ☐ Bank account information (i.e. copy of voided check) for tax refund and/or tax owed, if changed from prior year
- ☐ Your prior year tax returns (new clients only)
- ☐ Driver's License (Front and Back) for New clients or if expired since last provided

**** Important: A summary list only is required for medical/dental, business and miscellaneous expenses and charitable contributions. Please do not provide your receipts to our office but retain them with your records for a minimum of seven (7) years.***