



Tax Return Checklist | INDIVIDUALS

REQUIRED

- Copy of current state-issued driver’s license - if not already on file
- Identity Protection PIN (IP PIN) – if applicable
- Name(s), Social Security number(s) and date(s) of birth for all dependents
- Voided check for direct deposit or withdrawal
- Copy of previous year’s federal and state tax returns – *new clients only*

BASIC DOCUMENTATION

ADDITIONAL DOCUMENTATION YOU MAY HAVE

INCOME

- W-2s
- 1099-NEC/MISC
- 1099-INT Interest
- 1099-DIV Dividends
- 1099-R Retirement Distribution
- SSA-199 Social Security Benefits Statement

INCOME

- 1099-B Stock Proceeds/Transactions
- 1099-G Unemployment
- 1099-Q Educational Account Distribution
- K1 Schedule
- W-2G Gambling Winnings

EXPENSES

- 1098-T Tuition Statement
- 1098-E Student Loan Interest

CONTRIBUTIONS

- 529 Plan
- Traditional/Roth IRA
- Other

DEDUCTIONS

- Mortgage Interest Statement
- Charitable Donation Receipts (cash or non-cash)
- Child Care Expenses
 - Amount
 - Facility Name and Address
 - Employer Identification Number

DEDUCTIONS

- Major medical, dental and eyecare expenses (unreimbursed)
- Stock basis against stock sold
- HUD Closing Statement for home sale
- Mortgage refinance statement

TAXES PAID

- Real estate
- Car tax

TAXES PAID

- Investment property taxes
- Estimated tax payments (federal and state)