

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 to claim the child.
- W-2 Forms**.
- Your last paycheck stub of the year** (for each job).
- 1099 Forms** for interest, dividends, sales, retirement, Social Security, self-employment, unemployment, etc. *Remember to download and print statements from online accounts that don't send paper tax forms.*
- Property tax statements**.
- Forms 1098 for mortgage interest**.
- Foreign accounts**. Bring statements. Such assets must be disclosed even if they do not generate income.
- Purchase and sale information**, including dates, relating to anything sold.
- Stock options**. Forms 1099-B and supplemental statements showing 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). *Required even if you have a daycare flex account at work.*
- 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. Provide dollar amount, SSN of recipient and date of divorce.
- If you paid an individual \$600 or more for services in connection with your business**, please provide their name, address, and tax ID#.
- Records showing income and expense for business and/or rental property you own**. Records of business and personal mileage are required for automobile deductions.
- Form K-1** if you have an interest in a Partnership, S-Corporation, Estate or Trust.
- IRA** (traditional, Roth, SEP, Simple) year-end statements and forms 5498.
- Bring details for all other income**, whether you think it's taxable or not. Examples may include foreign income, barter, hobby, settlements, awards/prizes, etc.
- Forms 1098-T** for post-secondary tuition payments are sent to the student. If the student is your dependent you must get it from them.
- Forms 1099-Q** for education savings plan distributions.
- Student loan interest forms 1098-E**.
- Estimated taxes paid** (include amount and date).
- Adoption costs** if applicable. Also bring the legal adoption documents.
- Charitable donations**. Bring separate totals for cash and noncash contributions. Bring receipts. For noncash donations totaling over \$500 include date, place, fair market value, and original cost.
- Form 1098-C** for donations of automobiles or boats.
- If you purchased a new electric plug-in vehicle**, bring the year, make, VIN and purchase date.
- If you installed **solar or geothermal systems** for your home or cabin bring receipts.
- If you installed **other energy efficient home improvements** (e.g. furnace, AC, windows, doors, insulation, metal roof, etc.) bring receipts.
- If debts were forgiven**, bring Form 1099-C or 1099-A.
- If you bought, sold, or refinanced a home** bring the closing papers.
- Forms 1099-K for internet or credit card sales**.
- Health Savings Account (HSA) contributions and distributions**. Bring forms 5498-SA and 1099-SA.
- Form 1095-A** for health insurance purchased on healthcare.gov (or your state's ACA insurance marketplace).
- Out of pocket medical expenses** may be deductible (if large). Bring details.
- Form 1099-LTC** for long-term care policy benefits paid.
- Employee Retention Credits**. Bring details. You may have to amend a return for the tax year the credits were paid.
- Bring a voided check for direct deposit** of any refunds you expect to receive.