Personal Tax Checklist

General Information

- ☐ Any changes in names, marital status, address, phone numbers, email addresses?
- ☐ Purchase or sell any real estate?
- ☐ Anyone move in or out of your home?
- ☐ Begin or end any business entity?
- ☐ Copy of Driver's license for you and your spouse
- ☐ Copy of 2 prior years' returns (if this is your first year with us)
- ☐ Copy of any IRS notices received that you haven't already given us

Forms You Received

- ☐ W-2s (from each employer you worked for during the year)
- ☐ 1099-R (Retirement pay, distributions from retirement accounts)
- ☐ 1099-SSA (Social Security received)
- ☐ 1099-INT (Interest received from banks or investment firms)
- ☐ 1099-DIV (Dividends received from investment firms)
- ☐ 1099-B (Sales activity of investments)
- ☐ 1099-Consolidated (Some investment firm combine the INT, DIV, and B into one document)
- ☐ 1099-MISC (PFD, Rent received, income from customers of your small business, Other income)
- ☐ 1095-A, B, or C (Healthcare coverage either from employer or healthcare.gov)
- ☐ 1098-T (Tuition payments to universities)
- ☐ 1098-E (Student loan interest)
- ☐ 1098 (Mortgage interest statement)
- ☐ Schedule K-1 and Basis Schedule (Partnerships, S Corporations, or Trusts you are part of)
- ☐ Any other tax-related forms received
- ☐ December 31 balance of any retirement accounts (IRA, 401k, SEP, etc.)

Other Items of Interest

- ☐ Did you have any authority over a financial account in a foreign country?
- ☐ Did you have any income from states other than the state you reside in?
- ☐ Did you make any estimated payments to the IRS? (Date and amount)
- ☐ Did you make contributions to retirement accounts? (Type of account and amount)
- ☐ Did you pay for childcare so you could work? (Amount, name, address, EIN/SSAN)
- ☐ College expenses (Separated by student, Tuition, Dorm, Meals, Books, Fees)