# 1040 Individual Tax Return Checklist

You will find below a list of the common documents we will need to complete your tax return. Please go through the list, gather any documents that apply to you and schedule an appointment with us to do your return. Please note: We have provided this checklist as a courtesy to our new and existing clients, and it is to be used as a preparation tool only. We may still require additional documentation not listed below.

NOTES

- ☐ W-2 Forms
  This includes any employee wages & any gambling winnings
- ☐ 1099 Forms
  Any Dividends/Interest/Miscellaneous incomes
- ☐ 1098 Forms
  Y/E Mortgage Statements, Equity Loans, 2nd mortgages, etc.
- ☐ 1098-T Forms
  Student Tuition/Education Costs
- ☐ RTA Tax Paid (all vehicles)
  Vehicle Registerations/Tab Renewal Sheet
- ☐ Charitable Donation Receipts
  Any NON-cash donations must to be Verifiable
- ☐ Taxpayer(s) & Dependent Information
  SSN card & Birthdates for each person
  ****We must see *actual* documentation for each Dependent****

If you have not already done so, please complete the Tax Questionaire available in our *Document Center.*
Note any other documents that may apply to your return & any questions you have for us to ensure we have any information that may be pertinent to your tax return.

Other: