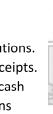
Year-End 1040 Checklist

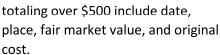
The following checklist will help you collect the documents needed to file your tax return.

- 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).
- IP PIN (IRS notice CP01A). IRS sends a PIN to victims of identity theft (or upon request). You can't reuse PIN from a prior year.
- 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.
 5498.
 Bring details for all other income, whether you think it's taxable or n
- If you bought, sold, or refinanced a home bring the settlement statement.
- 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 <u>all</u> 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. Employee Retention Credits. Bring
- 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





- Form 1098-C for donations of automobiles or boats.
- If you purchased a new or used electric plug-in vehicle, bring all documents provided by the dealership (year, make, VIN, purchase date, assembly location, & other qualifiers).
- If you installed solar, wind, geothermal, or fuel-cell systems for your home or cabin bring receipts.
- If you installed other energy efficient home improvements (e.g. furnace, central AC, water heater, windows, doors, insulation, heat pump, etc.) bring receipts.
- If debts were forgiven, bring Form 1099-C or 1099-A.
- Forms 1099-K for internet or credit card transactions.
- Health Savings Account (HSA) contributions and distributions.
 Bring forms 1099-SA and 5498-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.

