

Tax Return Checklist

This checklist is not all inclusive but can be used as a reference to make sure you are including all relevant documents with regard to your tax return preparation.

Income

- Form W-2 reporting wages, salaries and tips
- Interest income statements: Form 1099-INT, 1099-OID
- Dividend income statements: Form 1099-DIV
- Sales of stock or other assets for capital gains: Form 1099-B
- Sales of real estate: Form 1099-S
- State tax refunds: Form 1099-G
- Alimony paid or received (only if divorced before 1/1/19)
- Unemployment compensation received: Form 1099-G
- Miscellaneous income: Form 1099-MISC

Retirement Income

- Retirement income: Form 1099-R
- Social security income & railroad retirement income: Form SSA-1099

Business Income (See separate Self-Employed Business and Rental Property Checklists)

- Business income & expenses
- Rental income & expenses
- Farm income & expenses
- Form K-1 income from partnerships, trusts and S-Corporations

Information for Tax Credits

- Child care provider address, tax ID and amount paid by provider and child
- Foreign taxes paid if not already reported on Forms 1099
- Tuition statement Form 1098-T and other related expenses

Tax Payments

- Estimated tax payments made for the tax year being filed

Information for Deductions

- Charitable cash contributions
- Fair market value of non-cash contributions to charities
- Miles traveled for volunteering at a charitable organization
- Medical expenses and mileage (Note: Medical expenses may not be high enough to be deductible. Discuss with your preparer before collecting and totaling them.)
- Home mortgage interest Form 1098
- Real estate and personal property taxes paid
- IRA contributions
- Student loan interest paid