

Information Checklist for Individual Tax Returns

➤ **Please provide all year end tax reporting forms. The most common are:**

- ✓ Forms W2 “Wage and Tax Statement”
- ✓ Forms 1099
 - Interest Income
 - Dividend Income
 - Distributions from Pensions, Annuities, IRAs, etc.
 - Social Security Income
 - Miscellaneous Income from Rents, Royalties, Nonemployee Compensation
 - Sales of Stocks, Bonds, Real Estate
- ✓ Forms K-1
 - Partnerships
 - S-Corporations
 - Estates
 - Trusts
- ✓ Forms 1098 “Mortgage Interest Statement”
- ✓ Forms 1098-T “Tuition Statement”

➤ **We will also need:**

- ✓ Receipts for personal property taxes paid
- ✓ Receipts for real estate taxes paid (unless the tax is reflected on your mortgage statement)
- ✓ Receipts for charitable contributions made by cash or check
- ✓ Receipts for non-cash charitable contributions (If non-cash contributions in total are more than \$500, IRS requires the names and addresses of the done organizations, a description of the items donated, the date the items were donated, and the value of the items.)
- ✓ A “schedule of realized gains and losses” for all stock sales (Most brokerage companies include this information with the year-end reporting package; please bring it to us.)
- ✓ Settlement/Closing statements related to any real estate bought, sold, or refinanced during the year.
- ✓ Mileage records pertaining to any vehicle used in connection with your job, business, or rental property. We will need to know the number of business miles as well as the total miles for each vehicle for the year.
- ✓ A list of federal and state estimated tax payments made, if any (please include dates and amounts)
- ✓ A voided check for your checking/savings account if you choose to have tax refunds directly deposited (Direct deposit is not required, but it does result in faster refunds.)
- ✓ Businesses (schedules C, sole-proprietorships, single-member LLCs) Please refer to our “Business” checklist

➤ **New Clients:**

- ✓ Dates of birth and social security numbers for all taxpayers and dependents
- ✓ A copy of last year’s tax returns
- ✓ Depreciation schedules related to business and/or rental assets

Additional information may be requested during preparation of your tax returns.