



Individual Tax Return Checklist

Use this checklist to gather the documents needed to prepare your tax return.

Identification

- Driver's License or State ID
- Social Security Cards (Taxpayer, Spouse, Dependents)
- Bank Account Information for Direct Deposit
- Prior Year Tax Return (New Clients)

Income

- W-2 Forms
- 1099 Forms (NEC, MISC, INT, DIV, R, K, B)
- Social Security Benefits (SSA-1099)
- Unemployment Income (1099-G)
- Rental Income Records

Health Insurance

- Form 1095-A (Marketplace/ACA Insurance)
- HSA Documents (if applicable)

Education & Family

- Form 1098-T (Tuition Statement)
- Childcare Expenses & Provider Information
- Student Loan Interest (1098-E)

Homeownership

- Mortgage Interest Statement (1098)
- Property Tax Records
- Home Purchase or Sale Documents

Additional Documents

- Charitable Contributions
- Estimated Tax Payments
- IRS or State Tax Notices
- Any Other Tax Documents Received

Important: Please provide all tax documents and business records, even if you are unsure whether they are needed for your return.