



INDIVIDUAL TAX RETURN CHECKLIST

Personal Information

- ☐ Social Security numbers (or ITINs) for:
 - Taxpayer
 - Spouse
 - Dependents
- ☐ Driver's License or State ID
- ☐ Dates of birth for all on the return
- ☐ Current address
- ☐ Occupation
- ☐ Bank account and routing numbers
- ☐ Prior-year tax return
- ☐ Phone Number
- ☐ Identity Protection PIN (IP PIN)

Deductions & Credits

- ☐ Mortgage Interest (Form 1098)
- ☐ Property Taxes
- ☐ Charitable Contributions
- ☐ Medical Expenses (if itemizing)
- ☐ Student Loan Interest (Form 1098-E)
- ☐ Education Expenses (Form 1098-T)
- ☐ Childcare Expenses
- ☐ HSA Documents (1099-SA, 5498-SA)
- ☐ IRA Contributions
- ☐ Energy Credits (Solar, Energy-Efficient Improvements)
- ☐ Electric Vehicle Purchase Information

Income Documents

- ☐ W-2 Wage Statements
- ☐ 1099-INT Interest Income
- ☐ 1099-DIV Dividend Income
- ☐ 1099-B Brokerage Statements
- ☐ SSA-1099 Social Security Benefits
- ☐ 1099-R Retirement Distributions
- ☐ 1099-G Unemployment Compensation
- ☐ K-1s (Partnerships, S Corps, Trusts, Estates)
- ☐ Rental Property Income & Expenses (if applicable)
- ☐ Gambling Winnings (W-2G)
- ☐ Other Income Documents

Tax Payments

- ☐ Federal Estimated Tax Payments
- ☐ State Estimated Tax Payments
- ☐ Prior-Year Refund Applied to Current Year

Additional Information

- ☐ Cryptocurrency Transactions
- ☐ Foreign Bank Accounts
- ☐ Foreign Income
- ☐ IRS Notices
- ☐ State Tax Notices
- ☐ Home Purchase or Sale
- ☐ Major Life Changes (Marriage, Divorce, Birth, Death)

Health Insurance

- ☐ Form 1095-A (Marketplace Insurance)
- ☐ Form 1095-B or 1095-C (if received)

Important: Please provide all tax documents and business records, even if you are unsure whether they are needed for your return. All information will be reviewed to determine what is required for accurate tax preparation.