

# BASIC CHECKLIST

## *for* Individuals

- Last year's tax return and amount paid for preparing the tax return
- Social Security Numbers and birth dates for everyone on your tax return (includes you, your spouse, children and other dependents)
- All W-2 forms for you & your spouse (if applicable)
- All forms that say 1099 including the following:
  - 1099-MISC – self-employment or other income
  - 1099-R – Retirement and IRA withdrawals
  - 1099-INT – Interest earned on bank accounts
  - 1099-G – Government payments to you such as unemployment income or state tax refunds
  - 1099-SA – Withdrawals from Health Savings Accounts
- Any forms that say Schedule K-1
- Contributions you made to IRAs or other retirement plans
- All Medical Insurance Forms that say 1095 including the following:**
  - Form 1095-A – Health Insurance statement from the Market Place
  - Form 1095-B – Health Coverage Statement
  - Form 1095-C – Employer Provided Health Insurance Statement
- All Forms that say 1098 including the following:
  - Form 1098-INT – Records how much you paid in mortgage interest and real estate taxes ( if mortgage is paid off, list property taxes paid)
  - Form 1098-E – Student Loan interest Paid
  - Form 1098-T – College Tuition Expense ( including books) for you, your spouse, or children
- Personal Property taxes paid on vehicle registration ( if applicable in your State)
- Closing documents ( such as the HUD-1 statement( for a home you purchased)
- Charitable Contributions – including the following:
  - Amounts donated to houses of worship, schools or other charitable organizations
  - Records of non-cash charitable donations
  - Number of miles you drove for charitable purposes
- Other income and expenses (rental income and expenses, jury duty, gambling, hobby, alimony income, etc.)
- Employment-related expenses (dues, travel, publications, tools, uniforms, uniform cleaning, etc.)
- Job search expenses (if applicable)
- The date you purchased and your total investment in any stocks
- Child Care Provider's Name, Address, Federal ID# and Amount Paid for each dependent child under age 14.

**NOTE:** *If you are self-employed or have a small business, please request a basic checklist for small businesses*

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