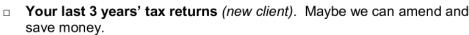
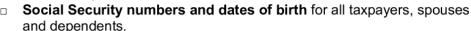
Year-end 1040 Checklist

The following checklist will help you collect the documents you'll need to file your tax return.





- Copy of Driver's License. For taxpayer & spouse.
- □ W-2 Forms.
- Your last paycheck stub of the year is full of useful information.
- 1099 Forms for interest, dividends, retirement, Social Security, unemployment, and other income need to be entered correctly to comply with the IRS matching program.
- Property tax statements contain important information. They list the tax (deductible) and special assessments (not deductible).
- Forms 1098 for mortgage interest need to be entered as printed. The IRS cross checks.
- Year-end statements from investment accounts with transaction details for the year.
- Assets held outside the USA. Bring statement(s). Such assets must be disclosed even if they do not generate income.
- Purchase and sale information, including dates, relating to anything sold is needed. Include sales
 denominated in ANY type of currency (including virtual currencies like Bitcoin).
- Child care provider information (name, address, SS#, amount paid) is needed for the child care credit (even if you are reimbursed at work).
- Names, addresses, and Social Security numbers from whom you received interest, or to whom you paid interest.
- Bankruptcy or divorce papers (if applicable).
- If you paid an individual person \$600 or more for services rendered in connection with your business, please provide their name, address, and tax ID number.
- Records showing income and expense for any business or rental property you own will be needed. Records of business and personal mileage are required for automobile deductions.
- If you have an investment in a Partnership, S Corporation, Estate or Trust you will need to bring Form K-1.
- Bring IRA year-end statements.
- Bring all other statements of income, whether you think they are taxable or not.
- Forms 1098-T amounts paid for post-secondary tuition are sent to the student. If the student is your dependent you must get it from them. Bring receipts.
- Forms 1099-Q for distributions from education savings plans.
- Bring your records of estimated taxes paid.
- Student loan interest forms 1098-E.
- Adoption costs if applicable. Also bring the legal adoption documents.
- Form 1098-C for donations of automobiles or boats.
- Details on all noncash donations. Include date, place, fair market value, and original cost.
- If you purchased a new electric plug-in vehicle, bring the year, make and purchase date.
- If you purchased solar-electric or solar water heating systems bring receipts.
- Bring a voided check for direct deposit of any refunds you expect to receive.
- Noncustodial parents claiming children need a signed IRS Form 8332 to claim the child.
- If your mortgage was forgiven due to foreclosure, bring Form 1099-C or 1099-A.
- If you bought a new home or refinanced your existing home bring the closing papers.
- If you received Forms 1099-K for internet or credit card sales please bring them.
- □ **Proof of health insurance is needed.** Bring Form 1095 if you received one.
- Health Savings Account (HSA). Bring forms 5498-SA and 1099-SA for yourself and spouse.
- Out of pocket medical expenses may be deductible (if large). Bring details.

