



Individual Tax Document Checklist

Documents you may need to prepare your tax return. Check all that apply.

<input type="checkbox"/>	All W-2s (income from employment)
<input type="checkbox"/>	All 1099s (for interest, dividends, from brokerage accounts, social security, retirement accounts, unemployment, state tax refund, miscellaneous income)
<input type="checkbox"/>	W-2G (gambling income)
<input type="checkbox"/>	K-1s (partnerships, S-corporations, estates, trusts)
<input type="checkbox"/>	Documents showing student loan interest
<input type="checkbox"/>	Documents showing HAS contributions and distributions
<input type="checkbox"/>	1099Q (withdrawals from an education account)
<input type="checkbox"/>	1098T (tuition paid)
<input type="checkbox"/>	1099A or 1099C (abandonment or foreclosure or property, cancellation of debt)
<input type="checkbox"/>	Closing statements on any property purchased or sold
<input type="checkbox"/>	Documents on any other income you received
<input type="checkbox"/>	Tax notices received from the IRS or state taxing authorities
<input type="checkbox"/>	Receipts with tax ID number, name and address for charitable contributions
<input type="checkbox"/>	Name, birthdate, and social security information for any new dependents
<input type="checkbox"/>	Dependent care forms from provide with tax ID number, name and address
<input type="checkbox"/>	Estimated tax payments for federal and state, dates paid and amounts
<input type="checkbox"/>	Receipts for energy efficient updates to primary residence (credits vary each year)
<input type="checkbox"/>	Copy of last years tax return if not prepared by your current tax preparer

Additional information:

<input type="checkbox"/>	Change in marital status
<input type="checkbox"/>	Change in number of dependents
<input type="checkbox"/>	You contributed to a retirement plan other than through your employer, you will need the amount contributed (due by April 15 of the following tax year for tax deduction)
<input type="checkbox"/>	Foreign investments or bank accounts

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