TAX CHECKLIST FOR INDIVIDUALS

You will need the following source documents when you meet with your tax advisor and accountant:

INCOME

- ☐ Form W-2(s)
- ☐ 1099 Forms (-MISC, -NEC, -INT, -DIV, -A, -B, -C, -G, -K, -Q, -R, -S and any other 1099 Forms)
- ☐ K-1 Forms
- ☐ Income from investments and interest
- ☐ Income from Social Security benefits
- ☐ Income from unemployment
- ☐ Income from alimony
- ☐ Income from jury duty
- ☐ Income from awards
- ☐ Income from gambling winnings (W2-G)
- ☐ Insurance reimbursements
- ☐ Rental property income
- ☐ Business income

EXPENSES

- ☐ Paid property and real estate taxes
- ☐ Paid state and local income taxes
- ☐ Estimated tax payments (amounts & dates)
- ☐ Form 1098 Mortgage Interest
- ☐ Form 1098-T and/or 1098-E (Education costs, tuition or student loan interest)
- ☐ Child care costs
- ☐ Medical and dental expenses
- ☐ Rental property expenses
- ☐ PMI and any points paid
- ☐ Documentation for business use of vehicle
- ☐ Casualty loss records for federally declared disasters
- ☐ Contributions to medical savings account
- ☐ Contributions to IRA
- ☐ Contributions to self-employed pension plan
- ☐ Charitable donation records

Above is a sample of the possible items your tax advisor or accountant may need to complete your return. This list is not exhaustive nor does it apply to everyone. Please seek advice from your accountant for information that applies to your individual situation.

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