**Year-end 1040 Checklist**

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

* **Your last 3 years’ tax returns** (*new client*.) Maybe we can amend and save you money.
* **Social Security number (SSN) and date of birth** for all taxpayers, spouses and dependents.
* **Copy of Driver’s License** for taxpayer and 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.
* **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 related to anything sold is needed. Include sales denominated in ANY type of currency (including virtual currencies like Bitcoin.)
* **Child care provider information** (name, address, SSN, 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, 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** bring Form(s) 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.
* **Forms 1098-C** for donation of automobiles or boats.
* **Details on all noncash donations.** Include date, place, fair market value, and original cost.
* **If you purchased a new electric plugin 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 documents.
* **If you received Form 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.