

Individual Tax Returns (1040)

Checklist of Documents Needed

Note: for 1st-time customers, please bring prior year taxes

Personal Information

- Your social security number or tax ID number
- Personal identification (Driver's License, State ID or Passport)
- Your spouse's full name, DOB, ID, and social security number or TIN

Dependent(s) Information

- Dates of birth and social security numbers or tax ID numbers
- Childcare records (including the provider's tax ID number) if applicable
- Income of other adults in your home
- Form 8332 showing that the child's custodial parent releasing their right to claim a child to the noncustodial parent

Sources of Income

Employed

- Forms W-2 – taxpayer and spouse

Unemployed

- Unemployment income (1099-G)

Self-Employed – see checklist for Schedule C

- Forms 1099-NEC or MISC, Schedules K-1, income records to verify amounts not reported on 1099s
- Records of all expenses — check registers or credit card statements, and receipts
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Office in home information, if applicable
- Record of estimated tax payments made (Form 1040ES)

Rental Income - see checklist for Schedule E

- Records of income (1099MISC) and expenses related to the property
- Rental asset information (cost, date placed in service, etc.) for depreciation

Retirement Income

- Pension/IRA/annuity income (1099-R)
- Traditional and ROTH IRA contributions
- Social security/RRB income (1099-SSA, RRB-1099)

Savings & Investments or Dividends

- Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-S)
- Dates of acquisition and records of your cost or another basis in property you sold (if the basis is not reported on 1099-B)
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- Expenses related to your investments
- Record of estimated tax payments made (Form 1040ES)

Other Income & Losses

- Gambling income (W-2G or records showing income, as well as expense records)
- Forms K-1s from 1120A, 1065
- Hobby income and expenses
- Prizes and awards
- Jury duty income
- Royalty Income 1099 Misc.
- Any other 1099s received

- Record of alimony paid/received with Ex-spouse's name and SS

Possible Deductions

Home Ownership

- Forms 1098 or other mortgage interest statements
- Real estate and personal property tax records
- Receipts for energy-saving home improvements
- All other 1098 series forms

Charitable Donations

- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Amounts of miles driven for charitable or medical purposes

Medical Expenses

- Amounts paid for healthcare insurance and to doctors, dentists, hospitals, labs, vision care, and prescriptions,
- Health Insurance
- Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)
- Form 1095-B and/or 1095-C if you had insurance coverage through any other source
- Marketplace exemption certificate (ECN) – needed for some state taxes only, not Florida

Childcare Expenses

- Fees paid to a licensed daycare center or family daycare for the care of an infant or preschooler.
- Wages paid to a babysitter. (Don't include expenses paid through a flexible spending account at work)
- New IRS Letter 6419 Advance Child Tax Credit paid during 2021
- Adoption expenses – if applicable

Educational Expenses

- Forms 1098-T from educational institutions for taxpayer and/or dependents
- Receipts that itemize qualified educational expenses
- Records of any scholarships or fellowships you received
- Form 1098-E if you paid student loan interest

Job Expenses & Tax Prep Fees – Applicable to some state taxes only

- Employment-related vehicle expenses (tolls, mileage, gas, maintenance, license, interest expense, parking)
- Receipts for classroom expenses for educators (reported on adjustment to income on the federal tax return)
- Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
- Job-hunting expenses
- Record of moving expenses not reimbursed by employer
- Amount paid for preparation of last year's tax return

State & Local Taxes or Sales Tax

- Amount of state/local income tax paid, or amount of state and local sales tax paid
- Invoice showing amount of vehicle sales tax paid

Retirement & Other Savings

- Form 5498-SA showing HSA contributions
- Form 5498 showing IRA contributions
- All other 5498 series forms (5498-QA, 5498-ESA)

Federally Declared Disaster

- Records to support property losses (appraisal, cleanup costs, etc.)
- Records of rebuilding/repair costs/ FEMA assistance information
- Insurance reimbursements/claims to be paid