

1040 Information Checklist

This is a list of the most common items we'll need to finish your returns. We'll call you if we need anything else. You don't need to return this to us; unless you make notes we should be aware of.

- _____ All W-2's
- _____ All 1099 forms received confirming income from interest, dividends, retirement, Social Security, disability, unemployment, gambling winnings, etc.
- _____ All income information for children if you want us to prepare any required returns
- _____ Year-end statement of mortgage interest (Form 1098), escrow activity and balance on mortgage or home equity loans and real estate taxes paid
- _____ Total of charitable contributions, and details for any noncash contributions over \$500
- _____ Copies of all LLC, Partnership or S-Corporation K-1's (send separately later if everything else is ready, and let us know it's coming)
- _____ If you bought, sold or refinanced real estate, then a closing statement for each transaction
- _____ If you sold any shares of mutual funds and basis information is not provided by the broker, detail all activity in the funds sold from original purchase date through date-of-sale date (year-end summary statements are ideal)
- _____ If you are claiming auto mileage as a deduction for business, rental properties or unreimbursed employee expenses, we need to know: total miles, commuting miles, and business miles driven for the year
- _____ If you lease your car or are deducting actual expenses, please also provide: original value of the car (what you could have bought if for) and date of lease, and all expenses for lease payments, gas, car washes, licenses, insurance, tires, repairs, etc.
- _____ Copies of any federal, state or local tax correspondence during the year, including all payments made or refunds received.
- _____ All legal documents for formation, sale or purchase of a business during the year
- _____ All legal documents for divorce decrees
- _____ Voided check for account where refunds should be direct deposit (optional)

New Clients

- _____ Copies of prior federal and local returns and depreciation schedules if applicable (at least one year, preferably three (3) years)