

INDIVIDUAL TAX RETURN CHECKLIST

When you are gathering information for your tax return be sure to include the following documents:

Income documents

- W-2s
- 1099s
- Social Security statement (1099-SSA)
- Dividend and interest statements (1099-DIV and 1099-INT)
- Retirement distributions (1099-R)
- Brokerage statements (1099-B), along with statements showing when you bought and sold your investments
- K-1 statements reporting profits from partnerships, trusts, and small businesses,
- Record of income and expenses for your rental property
- Record of income and expenses for your self-employment
- Gambling winnings (W-2G)

Other tax documents

- HUD-1 Escrow statement for property you bought or sold,
- Summary of educational expenses (college tuition),
- Summary of your child care, day care, or adult day care expenses,
- IRA contributions (traditional, SEP, or rollovers)
- Student loan interest paid (1098-E)

Tax deduction documents

- Health care expenses (doctors, dentists, health insurance, eye care, medicine)
- Real estate taxes
- Mortgage interest paid (1098)
- Gifts to charity
- Last year's tax preparation fees
- Job-related expenses (union dues, job education, uniforms)
- Loss of property due to casualty or theft
- Gambling losses