

Income Tax Document Checklist

	Description	✓	Required Documents
General	Dependents (NEW)		Name, Social Security # and Date of Birth
	Dependents (REMOVED)		Name
	Direct Deposit		Bank Account # and Routing #
	Driver's License		Copy of State Issued Drivers License for Taxpayer and Spouse
	Virtual Currency		Confirmation if You Received, Sold, Sent or Exchanged Virtual Currency
Income	Employment Income		Form W-2
	Interest & Dividend Income		Forms 1099-INT & 1099-DIV
	Sale of Investments		Form 1099-B and Original Cost of Investments
	Self-Employed Income		Detailed Summary of Income & Expenses For Each Business
	Rental Real Estate		Detailed Summary of Income & Expenses For Each Property
	Pension, IRA or Retirement Income		Form 1099-R
	Social Security		Form SSA-1099
	S Corps, Partnerships or Estates		Form K-1
	Gambling Income		Form W-2G
	Unemployment		Form 1099-G (Taxpayer may have to access online)
Deductions	Education Tax Credit		Tuition Statement
	Student Loan Interest		Form 1098-E
	Medical Expenses		Out-of-Pocket Expenses and Health Insurance
	Mortgage Interest		Form 1098
	Property Taxes		Property Tax Postcard, Tax Bill or Form 1098
	Charitable Contributions		Cash or Property Donated
Other	Purchased Of New Home		HUD-1 Statement or Closing Disclosure
	Sale of Previous Home		HUD-1 Statement or Closing Disclosure
	Subsidized Health Insurance		Form 1095-A
	Childcare Tax Credit		Name, Address, Tax ID # & Amount Paid