

Year-end 1040 Checklist

as of 1/13/25

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

- Your last year tax return. (new client only)
- Social Security numbers and dates of birth are needed for all new taxpayers, spouses and dependents.
- Copy of Driver's License for taxpayer & spouse if you renewed last year.
- W-2 forms and W2-G (Gambling winnings)
- Did you receive IRS document Form 1095-A (Health Insurance Marketplace Statement) if so, please attach.
- 1099 Forms for interest, dividends, sales, retirement, Social Security, self-employment, and unemployment need to be entered correctly to comply with the IRS matching program.
- Forms 1098 for mortgage interest need to be entered as printed.
- Assets held outside the USA. Bring statement(s). Such assets must be disclosed even if they do not generate income.
- Stock Options. Form 1099-B and "supplemental" brokerage statements showing amounts already reported as income on the employee's W-2.
- Cryptocurrency (e.g. Bitcoin, Euthereum) sales, send or exchange. Bring details including dates, proceeds, and original costs.
- Child Care Provider Information (name, address, SSN, amount paid) is needed for the childcare credit (even if you have a day care flex account at work).
- Names, addresses, and Social Security numbers from whom you received interest, or to whom you paid interest.
- Did your marital status change during the year? 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 expenses for any business or rental property you own will be needed. Records of business and personal mileage required for automobile deductions.
- If you have an investment in a Partnership, S-Corp, Estate or Trust you will need to bring K-1.
- Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA last year?
- Bring details for all other income, whether you think they are taxable or not (e.g. foreign income, barter, etc.)
- Forms 1098 -T amounts paid for post-secondary tuition are sent to student. If student is your dependent you must get it from them. Bring receipts.
- Forms 1099-Q for distributions from education savings plans.
- If you made contributions to the College 529 plan, bring the year-end statement(s).
- Did you transfer or rollover any amount from one retirement plan to another retirement plan?
- Bring your records of estimated Federal and State taxes paid.
- Student loan interest forms 1098-E.
- Adoption costs if applicable. Also bring the legal adoption documents.
- Form 1098-C for donations of automobiles or boats.
- Details on all cash and noncash donations.
- If you purchased solar-electric or solar water heating systems (for your home) or electric vehicle, 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 debts were forgiven, bring form 1099-C or 1099-A.
- If you bought or sold a home or refinanced your existing home, bring the closing papers.
- If you received forms 1099K for internet or credit cards sales, please bring them.
- Health savings account (HSA) contributions and distributions. Bring forms 5498-SA and 1099-SA.
- Out of pocket medical expenses may be deductible (if large). Bring details.