



Individual Tax Return Checklist for Year-End

- W-2's
- 1099's
 - INT (from banks)
 - MISC (outside contractor work)
 - DIV (for dividends from investments)
 - R (retirement distributions)
- Social Security benefits
- Sales Tax –Big purchases
- DMV Registration
- Donations
- Property Tax Payments
- K-1's (from partnership and/or business ownerships)
- Business Expenses (i.e. vehicle, uniforms, computer supplies, phone bills, etc)
- Health Insurance 1095's and/or Medical Premiums Paid
- Medical Expenses including co-pays, travel to and from doctors, prescriptions, eye glasses, labs, etc.
- Mortgage Interest Statement
- Buy or Sale of House Documents
- Federal and State Tax Returns from Previous Year
- Information on Asset's Purchase during the year
- Information on changes in filing status, dependents, or income