

Individual Filing Checklist

Everything to gather before your appointment or portal upload — for personal (Form 1040) returns.

Personal Information

- ☐ Social Security or ITIN cards — for you, your spouse, and any dependents
- ☐ Government-issued photo ID (driver's license or passport)
- ☐ Last year's federal and state tax returns (new clients especially)
- ☐ Direct deposit bank info (routing + account number) for any refund

Income Documents

- ☐ W-2s from every employer
- ☐ 1099-NEC / 1099-MISC — contract or freelance income
- ☐ 1099-INT / 1099-DIV — bank interest and investment dividends
- ☐ 1099-B — proceeds from stock, crypto, or other investment sales
- ☐ 1099-R — retirement plan or pension distributions
- ☐ 1099-G — unemployment compensation or a prior-year state refund
- ☐ SSA-1099 — Social Security benefits received
- ☐ Schedule K-1s — from any partnership, S-corp, or trust you have an interest in
- ☐ Records of any other income (rental, gambling, side income, etc.)

Deductions & Credits

- ☐ Form 1098 — mortgage interest paid
- ☐ Property tax statements
- ☐ Form 1098-E — student loan interest paid
- ☐ Form 1098-T — tuition statements, plus a record of qualified education expenses
- ☐ Childcare provider's name, address, and Tax ID/SSN, plus amount paid
- ☐ Charitable donation receipts (cash and non-cash)
- ☐ Out-of-pocket medical and dental expense records
- ☐ IRA or HSA contribution records

Other

- ☐ Form 1095-A/B/C — health insurance coverage statement
- ☐ Records of any estimated tax payments made during the year
- ☐ Any letters or notices received from the IRS or a state tax agency

Not sure whether something on this list applies to you? Upload what you have to your client portal and your preparer will follow up if anything else is needed.