

Tax Preparation Checklist

1040 - Individual Income Tax Return

Name _____

Tax Year _____

You Spouse Dependents

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Basic Information

Name, SSN or ITIN, and Date of Birth
Last Year's Return - hard copy or PDF file
Estimated Taxes Paid

Documents Received

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Form W-2s - wage and tax statements
Form 1095s - includes health insurance marketplace statement (1095-A), health coverage (1095-B) and employer-provided health insurance offer and coverage (1095-C)
Form 1098s - includes mortgage interest (1098) and student loan interest (1098-E)
Form 1099s - includes dividend income (1099-DIV), interest income (1099-INT & 1099-OID), merchant card and third party network payments (1099-K), miscellaneous income (1099-MISC), retirement plan distribution (1099-R), sale of home or real estate (1099-S), capital gain transactions (1099-B), distributions from an HSA, Archer MSA, or Medicare Advantage MSA (1099-SA) and unemployment compensation (1099-G)

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Form 2439s - notice to shareholder of undistributed long-term capital gains
Schedule K-1s - partnership, S Corporation and estate or trust income

Personal Records

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Child & Dependent Care Expenses
Education Expenses
Medical Expenses
Vehicle (Personal Property) Taxes Paid
Real Estate Taxes
Mortgage Interest Paid
Charitable Contributions
Business or Employee Expenses
Gambling Expenses
Investment Transactions
Retirement Contributions
Foreign Earned Income and Foreign Taxes Paid
Moving Expenses

E-File/Print

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Bank Information (Account and Routing Number for Direct Deposit/Withdrawal)
Prior year's Self-Select PIN or Prior year's AGI (Adjusted Gross Income)
Driver's license

This checklist is a fillable PDF. If you only open a preview of the checklist, it will not be fillable digitally.

Below are instructions for how to properly open this document so it can be completed digitally:

- 1. Download the PDF to your device by clicking the download icon or saving the file directly.**
- 2. Then, open the downloaded PDF on your device.**
- 3. Fill out the form by clicking in each field and either typing in your information or clicking to produce a checkmark.**
- 4. Once complete, save the filled-out form by selecting "Save As" (top right) then rename your file as you choose (ex: *1040_Complete*) and select the location on your device where you wish to save it.**
- 5. If you need to email the completed form to someone, include an attachment to your email and select this newly saved document as the attach, then send!**

If you encounter any issues, feel free to reach out for assistance!