

**PERSONAL TAX RETURN (1040) CHECK LIST**

- \_\_\_ Copy of **prior year return**
- \_\_\_ **Birthdates for taxpayer, spouse & listed dependents**  
(Social Security numbers are also needed if not on return)
- \_\_\_ **All tax-related forms:**
  - \_\_\_ **W-2's**
  - \_\_\_ **1099's** – for any misc. income, interest or dividend income, and distributions
  - \_\_\_ Social Security 1099, if receiving Social Security
  - \_\_\_ Investment & brokerage statements – year end

Itemized Deduction Items:

- \_\_\_ Amount of any **medical expenses** not reimbursed by insurance, if significant
- \_\_\_ **Form 1098 Mortgage interest** statement
- \_\_\_ **Real estate taxes** paid during year (may be listed on Mortgage form 1098)
- \_\_\_ **Points paid** on Mortgage loan (designate if refinanced or new home and loan term in years)
- \_\_\_ **Charitable contributions** – designate between cash & non-cash donations  
Important: *Provide the description, name & address of non-cash recipients*
- \_\_\_ **Tax preparation fees** paid during tax year
- \_\_\_ Investment or safe deposit box expenses paid during tax year
- \_\_\_ **Estimated federal tax payments** made for tax return year - provide date(s) and amount(s)
- \_\_\_ **IRA contributions** related to current year, if any
- \_\_\_ Provide bank name, routing & account numbers for **direct deposit of refund**
- \_\_\_ Un-reimbursed **business expenses**
- \_\_\_ Un-reimbursed **business mileage** (do not include commuting miles)

Additionally, you will want to refer to our **BUSINESS INCOME AND EXPENSES** check-list if you have a home-based business.