

Year-end 1040 Checklist

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



- A copy of your 2017 tax return, if not prepared by this office
- Provide any change of address, phone number, and e-mail address
- Provide any change in marital status
- Dependents (list dependents, date of birth, and their Social Security numbers)
Due to new IRS regulations, if you plan to claim children on your return, please bring with you: your children's social security cards, birth certificates, and any school and/or medical records that you have. The return cannot be filed without this information (only if we don't already have this on file).
- Form(s) W-2 (salary and wages)
- 1099-G (state tax refund and unemployment income)
- Alimony Received or Paid
- Proof of Health Insurance: **1095-A**, **1095-B**, and/or **1095-C**
- 1095-A** Health Insurance Marketplace Statement, (if health insurance was purchased through the marketplace)
- 1095-B** (from the health insurance company) and/or **1095-C** (from your employer) to show minimum essential health care coverage for the entire year.
- Form(s) 1099-INT (interest), 1099-DIV (dividends)
- Form 1099-B (brokerage statements from stock, bond, or other investment transactions)
- Form 1099-R (withdrawals from qualified retirement plans)
- Form SSA-1099 (social security)
- Schedule(s) K-1 (income/loss from trusts, partnerships, S corporations, etc.)
- Rental Income and Expenses (if the property was purchased or converted to rental use this year, provide purchase settlement statement and current property tax bill)
- Business Income and Expenses (include Form(s) 1099 received and paid in addition to a list of capital asset purchases and improvements)
- Form W-2G (gambling winnings)
- Form 1099-A&C (abandonment, foreclosure, or cancellation of debt income)
- Form 1099-S (sale of property)
- Moving Expenses (only if you were in the military and had unreimbursed expenses)
- Form 1098-E and Form 1098-T (student loan interest and tuition payments)
Due to new IRS regulations, if anyone on your tax return attended college in 2018, you MUST bring with you: Form 1098-T from the educational institution AND receipts for tuition and/or books OR a print out from the school showing tuition paid.
- Medical Expenses (medical expenses must exceed 7.5% of your adjusted gross income)
- Form 1098 (mortgage interest) for primary and second home; as well as rental properties. If you purchased a new home, bring the purchase papers.
- Property taxes on vehicles paid to your resident city
- Child or Dependent Care Expenses- name, address, SS# or EIN, and amount paid is needed for the child care credit
- Charitable Contributions- Cash and/or property contributions
- Educator Expenses up to \$250 (if you are a teacher and paid for classroom supplies and other materials out of pocket)
- Estimated Taxes Paid (including date paid)
- Bank routing and account number (to receive a refund or make payment electronically)
We MUST have a voided check or a printout from your banking institution that includes the routing and account number.