

1040 Information Checklist

This is a list of the most common items we'll need to finish your return. We'll call you if we need anything else. (You don't need to return this list to us unless you make notes we should be aware of.)

- All return packets or mailing labels sent to you by the various taxing agencies.
- All W-2's.
- All 1099 forms received confirming income from interest, dividends, retirement, Social Security, disability, unemployment, gambling winnings, and so on.
- All income information for children if you want us to prepare any required returns.
- Year-end statement of mortgage interest (Form 1098), escrow activity, and balance on mortgage or home equity loans and real estate taxes paid.
- Total of charitable contributions and details for any noncash contributions over \$500.
- Copies of all LLC, partnership, or S corporation K-1s (send separately later if everything else is ready, and let us know they're coming).
- A closing statement for each transaction if you bought, sold, or refinanced real estate.
- If you sold any shares of mutual funds and basis information is not provided by the broker, detail all activity in the funds sold from original purchase date through date-of-sale date (year-end summary statements are ideal).
- If you are claiming auto mileage as a deduction for business, rental properties, or unreimbursed employee expenses, we need to know total miles, commuting miles, and business miles driven for the year.
- If you lease your car or are deducting actual expenses, please also provide the original value of the car (what you could have bought it for); the date of lease; and all expenses for lease payments, gas, car washes, licenses, insurance, tires, repairs, and so on.
- Copies of any federal, state, or local tax correspondence during the year, including all payments made or refunds received.
- All legal documents for divorce decrees.
- Voided check for the account where refunds should be direct deposited (optional).
- Signed engagement letter (sent out with the organizer).
- Copies of cancelled checks for all federal and state estimated tax payments (all quarters paid).
- **New Clients:** copies of prior federal, state, and local returns and depreciation schedules, if applicable (*at least one year, preferably three*).

