Miller Verchota, Inc.
Certified Public Accountants

1040 Checklist

- [ ] All W-2's.
- [ ] 1099 forms received confirming income from interest, dividends, retirement, Social Security, disability, unemployment, gambling winnings, and so on.
- [ ] Income information for children (if applicable).
- [ ] 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 used for payment/refund.
- [ ] Copy of valid driver's license or passport.
- [ ] Signed engagement letter.
- [ ] Proof of payments for estimates (i.e. bank statements, payment receipts online, etc.)

New Clients: Copies of prior federal, state, and local returns and depreciation schedules, if applicable (at least one year, preferably three).