UNITED STATES TAX SERVICES

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TAX RETURN CHECKLIST

Basic Information

- ☐ ID (Driver's License/Identification Card/Passport)
- ☐ Social Security Number for you and all dependents
- ☐ Prior year tax return (if prepared in a different office)

Employed

- ☐ W-2
- ☐ 1099-G (if you received unemployment income)

Self-Employed

- ☐ 1099-NEC
- ☐ Income and Expenses
- ☐ Schedule K-1(s) (if in a partnership)
- ☐ Record of Estimated Payments Made

Rental Properties

- ☐ Date Placed in Service
- ☐ Income and Expenses
- ☐ 1099-S (Proceeds from Sale of Real Estate)
- ☐ 1098 - Mortgage interest statement
- ☐ Taxes & Insurance paid for each property owned

Retirement Income

- ☐ 1099-R (Distributions from individual retirement plans, plans), 401(k) plans, and other retirement savings
- ☐ SSA-1099 (Social Security Benefits)

Savings & Investment Income

- ☐ 1099-B (Sales of stocks, bonds & other investments)
- ☐ 1099-DIV (Dividends)
- ☐ 1099-INT (Interest Income)
- ☐ 1099-OID (Original Issue Discount on Bonds)
- ☐ 1099-SA (Distributions from Health Savings Account)

Other Documents / Deductions

- ☐ W-2G (Gambling Winnings)
- ☐ Alimony paid/received with Ex-spouse's name and SSN
- ☐ Form 1098 (Mortgage Interest)
- ☐ Real Estate Tax Bills
- ☐ Personal Property Tax
- ☐ 1095-A if you enrolled in an insurance plan through the Marketplace
- ☐ 1098-E (Student Loan Interest)
- ☐ 1098-T (Tuition for Higher Education)
- ☐ Records of IRA contributions made during the year

Business

- ☐ Articles of Incorporation
- ☐ EIN confirmation letter
- ☐ President/Owner information
- ☐ S-Election confirmation
- ☐ Income and expense records
- ☐ Prior year tax return (if it was prepared by a different office