Carlette White, CPA
CERTIFIED PUBLIC ACCOUNTANT

PERSONAL INCOME TAX CHECKLIST

PERSONAL INFO

- ☐ Proof of identification (Driver's License or Photo ID)
- ☐ Social Security numbers for you, your spouse and dependents
- ☐ Birth dates for you, your spouse and dependents
- ☐ A copy of last year's federal and state returns, if available
- ☐ Proof of bank account routing and account numbers for direct deposit such as a blank check
- ☐ Total paid for Child and Dependent Care expenses including provider's tax identifying number such as their Social Security number or business Employer Identification Number (EIN)
- ☐ Alimony Paid/Received
- ☐ Tuition Fees, Education Expenses, Student Loans
- ☐ Copies of income transcripts from IRS and state(s), if applicable

FORMS AND DOCUMENTS

- ☐ Form W-2s – Wage and Tax statements
- ☐ Form 1095s – includes health insurance marketplace statement (1095-A), health coverage (1095-B) and employer-provided health insurance offer and coverage (1095-C)
- ☐ Form 1098s – mortgage interest (1098) and student loan interest (1098-E)
- ☐ Form 1099s – includes dividend income (1099-DIV), interest income (1099-INT & 1099-OID), merchant card and third party network payments (1099-K), retirement plan distribution (1099-R), sale of home or real estate (1099-S), capital gain transactions (1099-B), distributions from an HSA, Archer MSA, or Medicare Advantage MSA (1099-SA) and unemployment compensation (1099-G)
- ☐ Form 2439s – notice to shareholder of undistributed long-term capital gains
- ☐ Schedule K-1s – partnership, S Corporation and estate or trust income
- ☐ Miscellaneous Income (1099-MISC) – Gambling winnings, scholarships, rewards, other income, etc.

OTHER PERSONAL EXPENSES

- ☐ Real Estate and Personal Property Taxes
- ☐ Charitable Contributions
- ☐ Business or Employee Expenses
- ☐ Gambling Expenses
- ☐ Tax Preparation Fees
- ☐ Medical Expenses
- ☐ Moving Expenses