Tax Return Document Checklist

Copy of previous year tax return (if new client)
Proof of identification / current address
Full name / date of birth
Social Security number(s) for self, spouse, children

Bank account and routing information for refund Direct Deposit
W-2 forms from all employers
Bank interest income (1099-INT)
Unemployment income (form 1099-G)
Retirement income forms (1099-R, 1099-DIV) / Social Security benefits
Child tax credits received
Alimony amount received/paid & ex-spouse’s information
Other income (1099, self-employment, Capital Gains, etc.)
Rental income information
Childcare expenses (providers name, address, tax ID, amount paid)
Document for limited charitable deduction ($600 or less)
Student loan interest paid
Education forms 1098-T / 1098-E
Receipts and documents for small businesses, partnerships, trusts, etc.

If itemizing:
Mortgage statement, interest paid, mortgage insurance premiums
Real estate / personal property taxes paid
Charity contribution records
IRA information (including value on Dec 31)
HSA contributions
Medical expenses (including insurance premiums & mileage)