

# **STANDARD 1040 REQUIREMENTS (IF APPLICABLE)**

## **Form & Information Checklist**

- Prior year Tax Returns
- W-2's (Wage & Tax Statements)
- 1099-G (State Refund Statement)
- 1099-Int (Interest Income)
- 1099-Div (Dividends Income)
- 1099-B (Capital Gain Income, include cost basis and purchase dates with the information)
- 1099-OID (Original Issue Discount)
- 1099-R (Distributions from Pensions, Annuities and Retirement Accounts)
- 1099-Misc (Non-employee compensation or Miscellaneous income)
- SSA-1099 (Social Security Benefits)
- Unemployment Compensation
- Self-Employment Income & Expenses; (See Self-Employment Checklist for more details.)
- Moving Expenses
- Home Office Expense; (See Home office Checklist for more details.)
- Rental Real Estate income and Expenses
- Royalty Income
- Schedule K-1's (Partner or Shareholders Share of Income from Partnerships, LLC's, S-Corporations, Trusts)
- Date & Amount of Traditional, Roth or Non-deductible IRA contributions
- 1098-E (Student Loan Interest)
- Alimony Paid or Received
- Household Employment
- Quarterly Federal and State Estimated Tax Payments paid for the current tax year.
- Medical and Dental Expenses
- 1098 (Mortgage Interest Statement)
- Real Estate Taxes
- Automobile License Fees (Deductibility varies by state)
- Investment Interest Expense
- Charitable Contributions (Cash or Noncash Receipts)
- Tax Preparation Fees
- Unreimbursed Employee Business Expense (See Business expense Checklist for more details)
- Other Expense (i.e. investment, safe deposit box etc...)
- Direct Deposit of Refund Request (Bank name, Account #, Routing #)