1040 Preparation Checklist

Please provide us with the following information to prepare your individual income tax return.

A copy of your prior year's tax return if not prepared by our office--including depreciation schedules if you had a Schedule C, E, or F last year.

Form(s) W-2 (wages, etc.)

Form(s) 1099 (interest, dividends, retirement/pension income, broker transactions, non-employee income, state tax refunds, etc.)

Schedule(s) K-1 (income/loss from partnerships, S corporations, etc.)

Form(s) 1098 (mortgage interest) and property tax statements/receipts

Receipts or statements for charitable contributions of $250 or larger

Brokerage statements from stock, bond or other investment transactions to include cost basis for stocks, bonds, and mutual funds sold during tax year

Closing statements pertaining to real estate transactions

Other supporting documents (schedules, checkbooks, etc.) for income, expenses, or deductions

Any tax notices received from the IRS or other taxing authorities

Complete and sign the vehicle sheet if you are claiming vehicle expenses or mileage for your business