



INDIVIDUAL TAX RETURN INFORMATION CHECKLIST - 2022

New Clients Basic Info

- Taxpayer, Spouse & Children's Names – Social Security Numbers & Birthdates
- Address & Phone Number (home, work or cell) & Email Address
- Copy of Previous Years' Returns (at least previous 2 years would be ideal)

Returning Clients Questions

- Did you recently move? If yes, we need your new address & closing statements.
- Did you change banks? If yes, please provide new account information.
- Did you add or lose any dependents this year? (Did you have a baby, or have a children graduate from college?)

➤ **We need the current driver's license of each person for whom we are filing a return**

INCOME

- W2s & 1099s or other income forms
- 1099 Interest Income – Bank Accounts
- 1099G Unemployment Compensation
- Social Security Statement(s)
- 1099R IRA Distributions – Regular or Roth
- 1099R Retirement Plan Distributions

STOCK/MUTUAL FUND STATEMENTS

- 1099DIV– Dividends & Interest on Stocks/Mutual Funds
- 1099B– Sale of Stocks Proceeds
(Date purchased & original cost)

CHILD CARE

- Providers Name, Address & Tax ID
- Daycare Paid

***DEDUCTIONS – Schedule A (if able to Itemize)**

- Medical/Dental Expenses – Including Insurance
Prem. & Long-term Care (must exceed 7.5% of AGI)
- Property Tax Statements
- Sales Tax on New Vehicles/Large Items (if more than State withholding)
- License Plate (s) – Renewal Fees
- Mortgage & Loc. Interest & Points of Refinancing
- Settlement Statement for New Home or Refinance
- Charity – Cash & Non-Cash above the \$300
Charitable Deductible allowed

****Under current tax rules, taxpayer may not be eligible to itemize***

HEALTH INSURANCE

- Proof of Health Insurance is no longer required unless:
 - Marketplace Insurance - must provide 1095A from Marketplace
 - Self Employed – must provide premium amount

TUITION/STUDENT LOAN INTEREST

- 1098T Tuition Statement
- Education Expenses (Books, computer etc.)
- 1098E Student Loan Interest

RENTALS

- Closing Papers, if New Rental
- Income – Rent Received
- Mortgage Interest
- Home Owner's Insurance
- Repairs & Maintenance
- Utilities
- Association Dues
- Rental Mileage

K-1s from S-Corps, Partnerships, Trusts