



TAX & ACCOUNTING  
SERVICE

# INDIVIDUAL TAX CHECKLIST

Please use this checklist as a guide to help you gather the documents needed for a smooth and successful tax preparation experience. Please note, not all forms will apply to everyone.

- Valid Drivers License, State ID or Passport, Date of birth(s) for dependents, Social Security Cards (for yourself and dependents)
- Daycare Statement complete with Name of provider, address of the location, Employer Identification Number and total amount paid per each child
- Income Documents W-2(s) and or 1099-MISC/NEC, 1099-C(s)
- 1098-T Tuition Statement. If applicable, also provide the amount paid out of pocket for supplies and equipment.
- 1098-INT (Mortgage Interest) 1099-S, Annual Property Tax Bill, 1099-INT, 1099-DIV, 1099-B Charitable Contributions, Medical and dental bills.
- 1095-A, 1095-B, IPPIN Letter (if the previous victim of Tax Identity Theft, tax return transcripts)

## ADDITIONAL DETAILS...

- A valid form of ID is required, and Social Security Cards are needed for everyone claimed on the tax return.
- Beginning tax season 2020, employers will issue forms 1099-NEC in the place of 1099-MISC. Tax returns, including the form 1099-NEC or MISC, will be considered a business tax return. Business expenses related to that income can be written off.
- To claim charitable contributions, medical expenses, etc you must itemize your deductions. To get the more significant deduction benefit, the total amount of the itemized deduction must exceed the standard duction received based on your filing status.



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