



TAX PREP CHECKLIST FOR INDIVIDUALS

Personal Information

- » Photo ID of head of household or person filing
- » A social security or tax ID number for everyone included on your tax return
- » Date of birth for everyone on your return
- » Bank information for direct deposit – account # and routing #

Income and Investment Information

- » Form W-2 Wage and Tax Statement
- » College student
 - » Are you enrolled in college? Remember to bring your Form 1098-T
- » Bank or financial institution statements
 - » Are you paying down on student debt? Be sure to grab your Form 1098-E
 - » Did you take out a home mortgage? Be sure to have your Form 1098 Mortgage Interest Statement
- » Other miscellaneous income records – this could include gambling winnings, lottery pay outs, etc
- » Any (and all) Form 1099's – there are several different types of 1099. Some of the common ones include:
 - » 1099-NEC if you are self employed and received \$600+ from a client
 - » 1099-DIV if you received dividends
 - » 1099-G if you received unemployment benefits
 - » 1099-K if you made third party transactions (through PayPal or Venmo, for example)
 - » 1099-R for distributions from a retirement plan, IRA, pension or annuity
 - » 1099-MISC if you have been paid at least \$600 in rental income, royalties, and/or prizes and awards

Other Receipts and Records

- » Form 1095: Health Insurance Coverage Forms
- » Social Security benefits – SSA-1099
- » All other forms for retirement
- » Childcare/daycare receipts or records



For more information, visit fourbands.org/taxprep, or contact us at 605-218-1144.