

Individual Tax Return Checklist

- **Sign Engagement Letter & Complete Tax Organizer** - We'll send these through our Client Portal
- **Driver's Licenses** - Please include a picture of your current driver's license or we can scan at the office
- **Prior Year Tax Return (New Clients)** - If you are new to Dow Tax, please include a copy of your prior year tax return

Sources of Income

- Employed
 - Forms W-2
- Unemployed
 - Unemployment, state tax refund (1099-G)
- Self-Employed
 - Forms 1099, Schedules K-1
- Rental Income
 - Records of income and expenses
 - Closing Disclosure
- Retirement Income
 - Pension/IRA/annuity income (1099-R)
 - Traditional IRA basis (i.e., amounts you contributed to the IRA that were already taxed)
 - Social security/RRB income (1099-SSA, RRB-1099)
- Savings & Investments or Dividends
 - Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
 - Income from sales of stock or other property (1099-B, 1099-S)
 - Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)
 - Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
 - Expenses related to your investments
 - Record of estimated tax payments made (Form 1040-ES)
 - Transactions involving cryptocurrency (Virtual currency)
- Other Income & Losses
 - Gambling income (W-2G or records showing income, as well as expense records)
 - Jury duty records
 - Hobby income and expenses
 - Prizes and awards
 - Trusts
 - Royalty Income 1099-Misc.
 - Any other 1099s received
 - Record of alimony paid/received with ex-spouse's name, SSN, and date of dissolution

Types of Deductions and Credits

The types of deductions you can take depend a lot on your life situation. It's likely you won't need all of the records listed below for your tax documents checklist.

- Home Ownership
 - Forms 1098 or other mortgage interest statements
 - Real estate and personal property tax records
 - Receipts for energy-saving home improvements (e.g., solar panels, solar water heater)

- All other 1098 series forms
- Charitable Donations
 - Cash amounts donated to houses of worship, schools, other charitable organizations
 - Records of non-cash charitable donations
 - Amounts of miles driven for charitable or medical purposes
- Medical Expenses
 - Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- Health Insurance
 - Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)
- Childcare Expenses
 - Fees paid to a licensed day care center or family day care for care of an infant or preschooler
 - Wages paid to a baby-sitter
- Educational Expenses
 - Forms 1098-T from educational institutions
 - Receipts that itemize qualified educational expenses
 - Records of any scholarships or fellowships you received
 - Form 1098-E if you paid student loan interest
- K-12 Educator Expenses
 - Receipts for classroom expenses (for educators in grades K-12)
- State & Local Taxes
 - Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
 - Invoice showing amount of vehicle sales tax paid
- Retirement & Other Savings
 - Form 5498-SA showing HSA contributions
 - Form 5498 showing IRA contributions
 - All other 5498 series forms (5498-QA, 5498-ESA)
- Federally Declared Disaster
 - City/county you lived/worked/had property in
 - Records to support property losses (appraisal, clean up costs, etc.)
 - Records of rebuilding/repair costs
 - Insurance reimbursements/claims to be paid
 - FEMA assistance information
- Residential Solar Credit
 - Invoice/contract from solar company
 - For Utah credit you must apply for TC-40E at energy.utah.gov
- Record of estimated tax payments made (Form 1040-ES)