

Form 1040 Tax Preparation Checklist

Use this individual tax preparation checklist to organize everything you need to file Form 1040. Includes W-2s, 1099s, investment income, dependent info, and deductions..

① Basic info

You	Spouse	Dependent	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Name, SSN or ITIN, and Date of Birth
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Last Year's Return - hard copy or PDF file
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Estimated Taxes Paid

② Documents Received

You	Spouse	Dependent	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form W-2s - wage and tax statements
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1095s - includes health insurance marketplace statement (1095-A), health coverage (1095-B) and employer-provided health insurance offer and coverage (1095-C)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Estimated Taxes Paid
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1098s - includes mortgage interest (1098) and student loan interest (1098-E)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1099s - includes dividend income (1099-DIV), interest income (1099-INT & 1099-OID), merchant card and third party network payments (1099-K), miscellaneous income (1099-MISC), retirement plan distribution (1099-R), sale of home or real estate (1099-S), capital gain transactions (1099-B), distributions from an HSA, Archer MSA, or Medicare Advantage MSA (1099-SA) and unemployment compensation (1099-G)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 2439s - notice to shareholder of undistributed long-term capital gains
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Schedule K-1s - partnership, S Corporation and estate or trust income

③ Personal Records

You	Spouse	Dependent	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Child and Dependent Care Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Education Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Medical Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Vehicle (Personal Property) Taxes Paid

Personal Records

You	Spouse	Dependent	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Investment Transactions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Retirement Contributions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Foreign Earned Income and Foreign Taxes Paid
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Moving Expenses

Personal Records

You	Spouse	Dependent	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bank Information (Account and Routing Number for Direct Deposit/Withdrawal)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Prior year's Self-Select PIN or Prior year's AGI (Adjusted Gross Income)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Driver's license

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