

Tax Interview Checklist - Individual

- Wage statements - W-2s
- Self-employment business income and expenses/1099-MISC
- Commissions received/paid
- Pension, retirement income - 1099-R
- Unemployment income - 1099-G
- Canceled Debt Amount - 1099-C
- Social Security income - SSA-1099
- IRA contributions
- Statements on the sales of stocks or bonds - 1099-B
- Interest and dividend income - 1099-INT, 1099-DIV
- Lottery or gambling winnings/losses
- State refund amount - 1099-G
- Income and expenses from rentals
- Alimony paid or received
- Record of purchase or sale of residence
- Medical and dental expenses, Proof of health insurance
- Real estate and personal property taxes
- State or local taxes paid
- Estimated taxes or foreign taxes paid
- Cash and non-cash charitable donations
- Mortgage or home equity loan interest paid - 1098
- Unreimbursed employment-related expenses
- Job-related educational expenses
- Educator expenses
- Tuition and Education Fees - 1098-T
- Student loan interest - 1098-E
- Casualty or theft losses
- Child care expenses and provider information
- Social Security card(s)
- Driver's License(s)
- Dependents' Social Security numbers and dates of birth
- Information concerning your Stimulus payment check
- Last year's Federal and State tax return