INDIVIDUAL INCOME TAX RETURN CHECKLIST

The following items are common documents needed for individual tax returns. The documents needed for your tax return will depend on your individual situation.

Personal Records

☐ Full Individual Legal Name, Birthdate, SSN, Address (including for any spouse and dependents)

☐ Last year's federal and state tax returns *(if a new client)*

☐ Estimated tax payments made *(if applicable)*

☐ Health Insurance Form 1095

☐ Bank account information *(if you want any refund to be direct deposited or any tax due to be automatically withdrawn)*

Income Records

☐ Personal W-2 statements

☐ 1099-MISC Income

☐ 1099-INT and 1098-INT Forms

Bank Accounts

Investments

Expense Records

☐ Alimony paid (including ex-spouses full legal name and SSN)

☐ Charitable Donations

☐ Childcare Expenses

☐ Medical and Dental Expenses

☐ Mortgage Interest Form 1098-INT

☐ Property Tax

☐ Student Loan Forms 1098-T and 1098-E Forms

To itemize deductions, the sum of allowable expenses needs to be greater than the standard deduction to provide a tax benefit. For the 2024 tax year the standard deduction is $14,600 for single filers and those married filing separately, $29,200 for those married filing jointly, and $21,900 for heads of household. Your tax advisor will work with you to determine if it is best for you to itemize or take the standard deduction.