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CHECK LIST FOR PERSONAL TAX RETURNS

This list is not inclusive and some items may not apply. It is a guide to assist you in gathering your information for our office to prepare your personal tax return for the year.

- Prior year tax return if you are a new client
- Filing status change
- Address change
- Estimated taxes paid (dates and amounts)
- W2's
- Interest income – form 1099-INT
- Dividend income – form 1099-DIV
- Alimony received or paid (if applicable)
- Pension/Annuity/IRA withdrawn/rollover – form 1099-R
- Unemployment funds received (if applicable)
- Stock/Mutual funds transactions – form 1099-B
  - Need basis information (purchase date, price and number of shares)
- Itemized deductions
  - Medical expenses paid out of pocket – insurance and long-term insurance premiums
  - Real estate taxes (principle residence and or second home/lake home)
  - License tabs paid for vehicles
  - Mortgage interest statements – form 1098
  - Non-reimbursed employee business expenses
- K-1's from partnerships and/or S Corporations
- Rental property income and expenses (must be itemized)
- Daycare provider information and amount paid
- Sale or purchase of real estate-closing statements from both
- If refinanced, loan origination fees, date, length of mortgage and/or closing statement
- Student loan interest
- Amount contributed to MSA/HAS and amount reimbursed
- IRA contributions
- Education expenses for MN tax return
- Sole proprietorship business (see business check list)