

# Tax Preparation Checklist

Individual Income Tax Return (Form 1040, Schedule C & Schedule E)

---

## 1. IDENTITY & PERSONAL INFORMATION

---

- Government Photo ID**  
Driver's license or passport for taxpayer & spouse
- Social Security Numbers / ITINs**  
For taxpayer, spouse, and all dependents
- Direct Deposit Details**  
Bank routing and account number for refunds/payments
- Prior Year Tax Return**  
Complete copy of your 2024 Form 1040 & schedules

## 2. GENERAL INCOME DOCUMENTS

---

- Form W-2**  
Wage and salary income statements
- Forms 1099-INT / 1099-DIV**  
Interest and dividend income statements
- Forms 1099-B**  
Stock, crypto, or property broker transaction records
- Forms 1099-R / 1099-G**  
Retirement/IRA distributions or unemployment details

## 3. SCHEDULE C: SELF-EMPLOYMENT & SOLE PROPRIETOR

---

- Forms 1099-NEC & 1099-K**  
Non-employee compensation & payment processor summaries
- Gross Receipts / Income Log**  
Cash, check, or app revenue not reported on a 1099
- Business Financial Statements**  
Annual Profit & Loss (P&L) statement or expense log
- Vehicle Mileage Log**  
Total miles split by business, commuting, and personal
- Home Office Details**  
Office square footage, total home square footage, and utilities
- Form 4562 / Prior Depreciation**  
First-year depreciation forms or ongoing asset schedules

## 4. SCHEDULE E: RENTAL REAL ESTATE & PASS-THROUGHS

---

- Form 1099-MISC**  
Rental income or royalty statements
- Gross Rental Receipts**  
Records of all rent received per individual property
- Rental Expense Records**  
Mortgage interest (1098), property tax, insurance, repairs
- Schedule K-1 Statements**  
Income/loss forms from Partnerships, S-Corps, or Trusts
- Property Closing Disclosures**  
Settlement statements if a property was bought/sold this year
- Rental Depreciation Records**  
Prior years' Form 4562 or internal depreciation schedules

## 5. COMMON DEDUCTIONS & TAX CREDITS

---

**Form 1098**

Mortgage interest and property tax statements for primary home

**Form 1095-A**

Health Insurance Marketplace Statement (Obamacare)

**Charitable Donation Receipts**

Acknowledge letters or logs for cash/non-cash donations

**Childcare Provider Info**

Total paid per child along with provider's EIN/SSN

**Estimated Tax Reminder:** If you made quarterly estimated tax payments to the IRS or state, please provide the exact dates and dollar amounts paid to ensure you receive full credit on your Form 1040.