



Individual Checklist

This Checklist will assist you in gathering documents necessary for your meeting and the preparation of your Tax Return.



- W-2** Annual income summary received from your employer
- 1099-Int** Interest income reported by Banks & Financial institutions
- 1099-Div** Dividend income reported by Banks & Financial institutions
- 1099-Misc** Non-employee Compensation, Rent, Misc
- 1099-B** Sale of stock - Please fill the attached sheet
- 1099-S** Sale of Real Estate
- 1099-R** Retirement or Pension Distributions reported by Financial Institutions
- 1099-G** State Refunds
- 1098-T** Tuition and fees paid to University / College
- 1098** Mortgage Interest, Points and Property Taxes paid
- K-1** Issued by S-Corporation, LLC and Partnerships to you as a member
- HUD-1** Issued when buying or selling Real Estate