**1040 Preparation Checklist**

Please provide us with the following information to prepare your individual income tax return.

* A copy of your prior year’s tax return if not prepared by our office—including depreciation schedules if you had a Schedule C, E, or F last year
* Form(s) W-2 (wages, etc.)
* Form(s) 1099 (interest, dividends, retirement/pension income, broker transactions, non-employee income, state tax refunds, etc)
* Schedule(s) K-1 (income/loss from partnerships, S corporations, etc.)
* Form(s) 1098 (mortgage interest) and property tax statements/receipts
* Receipts or statements for charitable contributions
* Brokerage statements from stock, bond or other investment transactions to include cost basis

for stocks, bonds, and mutual funds sold during tax year

* Closing statements pertaining to real estate transactions
* Other supporting documents (schedules, checkbooks, etc) for income, expenses, or deductions
* Any tax notices received from the IRS or other taxing authorities