



Donovan CPAs

INDIVIDUAL DOCUMENTATION CHECKLIST

Please include all the following information and forms (if applicable):

Changes in Personal Information

- Address, Phone, and Email
- Filing Status
- Dependents

Sources of Income

- Wage Statements (Form W-2)
- Interest Income and Dividend Income (Form 1099-INT and Form 1099-DIV)
- Stocks, Bonds, and Other Security Sales (Form 1099-B)
- Social Security Income (Form SSA-1099)
- Unemployment Income (Form 1099-G)
- IRA, Pension or Other Retirement Income (Form 1099-R and Form 5498)
- Payments from Qualified Education Programs (Form 1099-Q)
- Distributions From an HSA, Archer MSA, or Medicare Advantage MSA (Form 1099-SA)
- State Income Tax Refund (Form 1099-G)
- Gambling or Lottery Winnings (Form W-2G)
- Cancellation of Debt (Form 1099-C)
- Nonemployee Compensation (Form 1099-NEC)
- Miscellaneous Income (Form 1099-MISC)
- Partnership or S Corporation Income (Form K-1)
- Trust or Estate Income (Form K-1)
- Sale of Home (1099-S)

Deductions and Adjustments

- Proof of Health Insurance for the year (if applicable - Forms 1095-A, 1095-B, 1095-C)
- Estimated Income Tax Payments (federal and all states)
- Traditional IRA Contributions
- Mortgage, Home Equity Loan Interest, and Mortgage Insurance Premiums (Form 1098)
- Medical Expenses (including dental and eye care)
- Charitable Contributions (cash and non-cash)
- Child Care Expenses
- Educator Expenses
- Student Loan Interest (Form 1098-E)
- Tuition and Education Fees (Form 1098-T)
- Payments to Education Savings Plan (College Choice 529)
- Real Estate Taxes
- Automobile Excise Tax (car registrations paid in 2020)

Self-Employed Business or Rental Property

- Copy of QuickBooks file (if applicable, please include username and password)
- Summary of Income and Expenses by Category (i.e. rent, sales, advertising, repairs, utilities, etc.)
- Assets purchased in 2020 over \$500 per item
- Asset Sales or Disposals
- Self-Employed Health Insurance Payment

This list does not include all IRS forms. If you believe you have received a reportable form that is not included in the list above, please provide it with your tax documentation.