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## INDIVIDUAL TAX RETURN CHECKLIST

### Income:

- W2's
- Consolidated 1099 (investment accounts)
- Form 1099-INT
- Form 1099-DIV
- Form 1099-B
- Form 1099-G
- Form 1099-R
- Form 1099-MISC
- Form 5498 IRA Contribution

### Deductions:

- Form 1098 Mortgage Interest
  - Please ensure amount of real estate tax paid by your lender is shown
  - Need front and back of form
- Form 1098-E Student Loan Interest
- Form 1098-T Tuition
- Selling/ Buying a House: HUD Settlement, Closing Disclosure, etc.
- Real Estate tax paid
- Excise tax paid
- Total Charitable donations made (cash & non-cash)
- Total Medical Expenses
- Unreimbursed employee expenses

### Schedule E or C:

- Please provide a summary of income and expenses
- 1099-MISC received

### Also required:

- Front/Back copy of License (for all tax payers filing a return, children included)
- Form 1095 A, B, C
- 1099 HC