

PERSONAL TAX CHECKLIST

No	DOCUMENTS NEEDED	
1	W-2s	
2	1099s (NEC, INT, DIV, G, R, MISC)	
3	1098-T	
4	1098-E	
5	1095-A/B/C	
6	Mortgage interest	
7	Property tax records	
8	Childcare costs + provider EIN	
9	Retirement contributions	
10	HSA forms	
11	Brokerage statements	
12	Crypto reports	
13	K-1s	
14	Donation receipts	
15	Energy credit receipts	
16	Last year's return	
17	IRS/state notices	
***	Optional: alimony, adoption, energy upgrades, casualty/loss	