

Personal Income Tax Return Information Checklist

Name: _____

Phone: _____

Email: _____

Income or Deduction Item

Information / Documents Needed

<u>Income or Deduction Item</u>	<u>Information / Documents Needed</u>
Changes in address, marital status, dependents	Provide updated info
New Dependents	Name, DOB, Social Security Number
Notices received regarding previous year's taxes	Provide Copy
Wages	W-2
Overtime & Tip Deductions	Statements verifying eligible amounts
Interest & Dividend Income	1099-INT / 1099-DIV
Retirement Income / Withdrawals	1099-R
Unemployment Income	1099-G
Social Security Income	SSA-1099 / RRB-1099
Partnership, S Corporation, Trust Income	K-1
Self-Employed or Rental Real Estate	Income & Expense Details
Stock & Asset Sales	1099-B / 1099-S
Insurance Coverage (marketplace insurance only)	1095-A
Health Savings Account Distributions	1099-SA
IRA, Roth IRA, or SEP Contributions	Contributed amount & account owner
Student Loan Interest	1098-E
Vehicle Loan Interest (eligible new vehicles only)	Loan interest amount & VIN number
Medical & Dental Expense	Amounts Paid
Real Estate Taxes	Amounts Paid or Receipt
Motor Vehicle / Personal Property Taxes	Amounts Paid or Receipt w/ Excise Amount
Mortgage Interest	1098
Cash & Non-Cash Contributions	Amounts Paid / Receipts for non-cash
Child Care Expenses	Name, Address, Federal ID #, Amount
Education Expenses (1098-T)	1098-T & Amount for books, etc.
529 Account Withdrawals	1099-Q
Energy Efficiency Improvements	Description, Date, Amount Paid
Electric Vehicle Credits (NEW!)	Purchase Invoice
Rent Paid - Indiana Residents	Name & Address of Landlord, Amount Paid
Estimated Tax Payments	Dates & Amounts Paid
IN College 529 Contributions	Name, Account Number, Amount Contributed
Foreign Asset & Account Reporting	Information re: foreign assets & accounts
Virtual Currency	Info re: receipt, sale, exchange, or acquisition

Direct Deposit

Do you wish to have your refund direct deposited?

_____ Yes _____ No

Bank Name: _____

Acct Type: _____ Checking _____ Savings

Routing #: _____

Account #: _____

Tax Return Delivery & Payment Options

Would you like to be provided with vouchers and envelopes for return payments due and estimates?

_____ Yes, I will be mailing checks and I would like printed vouchers and envelopes

_____ No, I prefer to make payments online - no vouchers needed