C3CPA | CERTIFIED PUBLIC ACCOUNTANTS

Individual Tax Prep Checklist

Gather these items before your appointment so we can prepare an accurate return the first time.

Personal information

- Photo ID and Social Security numbers for you, your spouse, and dependents
- Prior-year federal and state returns
- Bank routing and account numbers for direct deposit
- IRS Identity Protection PIN, if issued

Income documents

- Forms W-2 from all employers
- Forms 1099-NEC / 1099-MISC for contract work
- Forms 1099-INT, 1099-DIV, and 1099-B for interest, dividends, and investment sales
- Forms 1099-R for retirement distributions and SSA-1099 for Social Security
- Schedule K-1s from partnerships, S corporations, estates, or trusts
- Rental income and expense summary by property
- Digital asset and cryptocurrency transaction reports

Deductions and credits

- Form 1098 mortgage interest and property tax statements
- Charitable contribution receipts (cash and non-cash)
- Medical and dental expenses paid out of pocket
- Forms 1098-T and 1098-E for tuition and student loan interest
- Childcare provider name, address, EIN, and amounts paid
- HSA contributions (Form 5498-SA) and distributions (1099-SA)
- Energy-efficient home improvement invoices

Payments and life changes

- Estimated tax payments made, with dates and amounts
- Marriage, divorce, birth, adoption, or death in the family
- Home purchase or sale closing statements
- Change of state residency or time worked in another state

C3CPA · Rio Rancho, New Mexico · (505) 595-2788 · info@c3cpa.com