

Individual Tax Return Checklist

Personal Information:

- ☐ Social Security numbers, full names and birth dates for everyone included on your return.
- ☐ Driver's license number, issue and expiration dates for you (and your spouse).
- ☐ Identity Protection Personal Identification Number (IP PIN) if IRS has provided - usually due to fraud.
- ☐ Amount of alimony paid and ex-spouses Social Security number, address and divorce decree date.
- ☐ Childcare records including the provider's ID number, and address. Please provide form if possible.
- ☐ Signed Strategic Tax & Business Consultants Engagement Letter.
- ☐ Any tax notices sent to you by the IRS, MN Revenue, or other taxing authority.

Income/Investments/Retirement:

- ☐ All forms that say W-2, 1099, SSA, SA, or Schedule K-1's and all other relevant tax documents.
- ☐ 1099 brokerage statements from financial institutions.
- ☐ Records of any contributions you made to IRA's, other retirement plans and 529 plans.
- ☐ Records of business income and expenses if you're an independent contractor, are self-employed, or own rental real estate.
- ☐ Records of other income (jury duty, gambling, alimony, etc.)
- ☐ Closing statements for any real estate purchased or sold.
- ☐ Cryptocurrency transaction records

Healthcare:

- ☐ Form 1095-A if you are enrolled in the Marketplace (Exchange).
- ☐ HSA information - Forms 5498-SA and 1099-SA.

Education:

- ☐ Form 1098-T or records for tuition and other higher education expenses.
- ☐ Student loan interest paid (Form 1098-E).

Itemized Deductions:

- ☐ Form 1098 Mortgage Interest Statement.
- ☐ All CRP (Certificate of Rent Paid) forms if you rent.
- ☐ Real estate tax statement (if not reported on a 1098).
- ☐ Personal property tax records, license tab renewal or license plate number.
- ☐ Medical expense records.
- ☐ Prior year's amount of state/local income tax paid and date.
- ☐ Records of cash amounts donated to houses of worship, schools and other charitable organizations.
- ☐ Records of non-cash charitable donations.
- ☐ Records of miles driven for charitable purposes.

These documents can be uploaded to your portal, sent electronically (via secure link) or mailed to us. Contact Lynne Wollo if you would like a secure email link: lwollo@strategic-taxes.com.