



TAX RETURN CHECKLIST

Personal

- W2s
- 1099-INT (from banks, brokerages,...etc)
- 1099-DIV
- 1099-S (Social Security benefits)
- 1099-G (state refunds, unemployment,...etc)
- 1099-MISC
- 1099-B (sale of securities, from your broker)
- 1099-S (sale of real estate)
- 1099-SA (Health Savings Accounts)
- Form 1098 (Mortgage Interest)
- Form 1098-T (Tuition & fees)
- Alimony payments (paid or received)
- Real Estate Tax Receipts
- Personal Property Tax Receipts
- Summary of Medical and Dental expenses
- Summary of Charitable Donations
- Child Care Expenses
- IRA Contributions
- Schedule K-1s (from partnerships, trusts,...etc)

Business

- Vehicle Mileage Log
- Expense receipts for:
 - Travel expenses
 - Association Dues
 - Job-related education
 - Tools
 - Work clothes
- Records of Income:
 - Rental Income
 - All other income



Questions? Just Ask:

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If you can answer "yes" to any of these questions, provide us with all related documents:

- Did you have a casualty loss this year – from fire, theft or natural disaster?
- Did you move your personal residence this year?
- Did you sell your home during the year?
- Were there any births, deaths, adoptions, divorces, or marriages in your household?
- Did you receive any installment payments on property sales?
- Did you receive any other income from a source not mentioned on this checklist?
- Did you purchase any vehicles, furniture, equipment, or machinery for your business?
- Do you work out of your home on a regular basis?

Thank you for choosing NEA Financial Services!