



Checklist of Documents and Information Needed to Prepare Your Tax Return

The following list covers the most common items needed to prepare your individual tax return, but it is not 100% inclusive. If you are uncertain about an item of income or expense and whether it is reportable or deductible, please bring the records with you and we'll sort it out.

- Copy of prior year's federal and state return
- All W-2s
- Records of other income, such as self-employment income, tip income, rental income, alimony or unemployment compensation
- All 1099-INTs (from investment and bank accounts)
- All 1099-DIVs (from investment accounts)
- All 1099-Bs (from investment accounts)
- All 1098s (mortgage interest statements)
- A report listing charitable donations
- Amount of personal property tax paid (Virginia residents)
- All 1099s Miscellaneous
- Date-of-birth for yourself, spouse, and all dependents
- Social Security Numbers (SSNs) for yourself, spouse and all dependents
- Rental income and rental property expenses (if applicable), sales price and cost basis for any stocks or mutual funds sold (if applicable)
- Name, address, SSN/EIN and amount paid to each day care provider (if applicable)
- Amount of long term care insurance paid (if applicable)
- Listing of medical expenses (Note: Medical expenses must be more than 7.5% of your income before anything can be deducted)
- Amounts invested in college savings accounts (if applicable)
- All 1099-Rs
- 1099-SSA - Social Security statements showing benefits received/recorded
- Settlement sheets related to purchase, sale and/or refinance of real estate
- All year-end investment account statements for retirement and non-retirement accounts
- Receipts related to energy efficient improvements (does not include appliances)

Northwest Tax Group (a subsidiary of Northwest Financial LLC) offers professional tax planning, preparation, and audit and accounting services. Tax services are offered in partnership with DeLeon & Stang, CPAs. Call us to schedule an appointment at (703) 810-1072, ext. 110.