



## Individual Tax Return Checklist

- Copy of last year's tax return OR a copy of the IRS Transcript – Receive your copy by going to (<https://www.irs.gov/individuals/get-transcript>)
- Copy of ID or Driver License for Taxpayer & Spouse - Required for electronic filing
- W2; 1099NEC/1099MISC; Income related to Business and Pass-thru if any (K-1, 1099-K or financial documents showing Profit & Loss and the Balance Sheet); Rental Income/Expenses; Pensions & Annuities; Alimony; Foreign Income; Social Security; Stocks & Bonds; Gambling; Interests & Dividends, Unemployment Income
- Mortgage Interest Statements & Property Tax Records FORM 1098;
- State/Local Tax Refunds
- Employment Related Expenses and Mileage records (that are not reimbursed to you)
- Premium Tax Credits: FORM 1095A; 1095B; 1095C from your Health Insurance Carrier, Employer, or the Marketplace
- Records of Charitable Contributions: \$250 or more or any Non-cash Donations (Contemporaneous Receipts from qualified charitable organizations and Appraisal if required)
- Medical Bills paid exceeding 7.5% of your income – includes premiums paid, deductibles and copays
- IRA/Retirement Contribution records FORM 5498
- HSA Accounts – FORM 1099-SA; records of distributions used for medical expenses
- Dividend/Interest/Distributions Income – supplied by the Bank: 1099-R, 1099-DIV, 1099-INT, 1099-SA
- Investment accounts, Bitcoin activities and/or other Capital Gains – supplied by servicer: 1099-B
- Education Savings Contribution Records (Path to College, Educational IRA)
- Student Loan interests (1098-E) & Tuitions and Fees paid - supplied by the educational institution: 1098-T
- Child/Dependent Care Expenses Receipts showing the institution's Federal Employer ID (FEIN)
- Vehicle Tag and/or other Personal Property Taxes (paid to your local government)
- Closing Statements for personal real estate transactions
- Moving Expenses (Employer provided, active military members)
- Records of Estimated Taxes Paid & Dates of payment
- Qualifying Purchase records for eligible Energy Credit; specific to YOUR STATE OF RESIDENCE (EV Purchase, Energy Star certified products, Solar Energy, Renewable Energy Products)
- Foreign Income and Foreign Financial Accounts: Balance of More than \$10,000 at any time of the year – Please provide the foreign account's Bank Statement ending 12/31

\*\* Not All item on this list may apply to you.

\*\* If you were Self-Employed, had Rental Income or a Shareholder of a Corporation/Partnership, additional information is needed to prepare your tax return. Please call us for assistance.

*Please upload your documents using our Canopy Client Portal.  
If you need access to our portal system, please call or email us and we will send you an invitation.*