

# Income Tax Return Checklist

Please gather all of the documents listed below and enter Y or N in the respective cell of the Y/N column. For any document that does not apply to you, mark the cell "N/A". Fax or email ([sergioa@nfocustax.com](mailto:sergioa@nfocustax.com)) copies of the documents, together with this completed checklist. Our fax number is 877-678-1672. Be sure that faxed documents are legible (avoid cell phone scans) and complete (no sides cut off). No work will begin on your return until this completed checklist is received.

Item	Description	Y/N?
Taxpayer name*		
Address*		
Occupation*		
Date of birth*		
Telephone		
Email address*		
Banking info (bank name, routing, account number)		
Copy of tax returns	Provide copies of the last two tax returns, including Sates	
Dependent info (Name, SSN and date of birth)		
Form 1095-A, B or C	Health coverage information	
Form 1099-SA	Health Savings Account (HAS) distributions	
Form 5498-SA	HSA contributions (exclude the employer's share)	
Form W-2	Salary or wages from a job (be sure to include all W-2s)	
Form 1099-MISC	Miscellaneous income (Schedule C - Self-employment)	
Form 1099-INT	Interest income	
Form 1099-DIV	Divident income	
Form 1099-R	Pension income (retirement or other distribution)	
Form 1099-B	Sales of securities (stocks, bonds, funds)	
Form 1099-G	Unemployment compensation and state refunds	
Form 1099-Q	Payments from QEPs (Qualified Education Plans)	
Form SSA-1099	Social Security year-end statement	
Form 1098	Statement of mortgage interest paid	
Form 1099-C	Cancellation of debt statement	
Form 1098-E	Statement of student loan interest paid	
HUD Statement	Statement on the sale of a house	
Charitable donation	If item is worth more than \$500, provide recipient's ID info	
Medical expenses	Payments for drugs, doctors and hospitals	
Auto business expenses**	Provide detailed mileage logs (use separate checklist for details)	

\*Note 1: Provide this information for each dependent

\*\*Note 2: Provide vehicle's year, make and model, and business miles driven during the year