SIEGELAUB ROSENBERG P.A.
CERTIFIED PUBLIC ACCOUNTANTS & ADVISORS

Tax Return Checklist

Here is a list of the most common documents needed to prepare your return

Individual Clients (1040):

W2's
1099-Int / 1099-Div
1099 Year end summary (stock sales)
Business income and expenses for self-employed individuals 1099-R (retirement income)
Social security statement
Gambling winnings/Gambling losses
Health insurance form 1095a/1095c
IRA contributions
Student loan interest paid
Mortgage interest paid
Real estate taxes paid
Donations
Rental property (income / expenses)

Corporate Clients (1120/1065):

Bank statements for the year
Check stubs / check copies
QuickBooks file
Loans to the company
Loan balances as of 12/31
Accounts receivable and accounts payable as of 12/31

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