



BLUEBONNET TAX SERVICES LLC

We make complicated stuff easy!

Individual Tax Return Checklist

Things needed to prepare your tax return:

- Driver's license for Taxpayer and Spouse
- Last year's tax return
- Social Security Card and Birth Certificate for dependents
- Bank account number and routing number for direct deposit

Sources of Income:

- W-2 and/or 1099-NEC
- 1099-R
- SSA-1099
- 1099-G (unemployment or state tax refund)
- 1099-C (cancellation of debt)
- 1099-S (sale of property if received)
- Profit and Loss Statement from your small business
- 1099-K if you use PayPal/Venmo/Square/Stripe/CashApp (New this year--Let's talk!)

Savings and investment Income:

- 1099-INT / 1099-DIV
- 1099-B
- Do you have Cryptocurrency: Bitcoin, Digital Assets? (Look for a 1099-B, 1099-DA, 1099-DIV, 1099-CONSOLIDATED, or Form 8949. Even if you think you didn't make money, we still need these reports)

If you itemize:

- 1098 Mortgage Interest Statement and Real Estate Taxes paid
- Charitable donations
- Medical expenses if excessive (more than 7.5% of your income)

Other items you may also have:

- 1098-T Tuition Statement
- 1098-E if you paid student loan interest
- Childcare records
- Alimony received or paid for divorces before 2019
- 1095-A if you purchased healthcare through the Marketplace
- Contributions to or distributions from HSA
- Contributions to IRA
- Teachers include proof of classroom expenses paid **NEW claim up to \$300 **
- Correspondence from the IRS
- Anything else you think might be helpful or tax-related