





What I Need to File

2016 Checklist • 1040 Individual Income Tax Return

Reminder: 2016 taxes are due April 17, 2017

You	Spouse	Dependents	 Basic Information
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Name, SSN or ITIN, and date of birth
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Last Year's Return - hard copy or PDF file
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Estimated Taxes Paid
You	Spouse	Dependents	 Documents Received
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form W-2s - wage and tax statements
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1095s – includes health insurance marketplace statement (1095-A), health coverage (1095-B) and employer-provided health insurance offer and coverage (1095-C)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1098s - includes mortgage interest (1098) and student loan interest (1098-E)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1099s - includes dividend income (1099-DIV), interest income (1099-INT & 1099-OID), merchant card and third party network payments (1099-K), miscellaneous income (1099-MISC), retirement plan distribution (1099-R), sale of home or real estate (1099-S), capital gain transactions (1099-B), distributions from an HSA, Archer MSA, or Medicare Advantage MSA (1099-SA) and unemployment compensation (1099-G)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 2439s - notice to shareholder of undistributed long-term capital gains
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Schedule K-1s - partnership, S Corporation and estate or trust income
You	Spouse	Dependents	 Personal Records
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Child and Dependent Care Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Education Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Medical Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Vehicle (Personal Property) Taxes Paid
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Real Estate Taxes
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mortgage Interest Paid
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Charitable Contributions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Business or Employee Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Gambling Income / Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Investment Transactions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Retirement Contributions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Foreign Earned Income and Foreign Taxes Paid
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Moving Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Energy Efficiency Property Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Household Employee Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Alimony Expenses / Income
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Expenses for miscellaneous itemized deductions
You	Spouse	Dependents	 E-file / print
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bank Information (Account and Routing Number for Direct Deposit/Withdrawal)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Prior year's Self-Select PIN or Prior year's AGI (Adjusted Gross Income)