

DOREEN CARTER, CPA, PLLC
FORMS CHECKLIST
FOR PREPARATION OF ANNUAL TAX RETURNS

FORMS
Copy of prior year tax return (if completed by another preparer)
Copy of your driver's license (and spouse, if applicable)
Completed Tax Organizer
Signed Engagement Letter (you may also e-sign the letter in Liscio)
W-2 (wages)
1099-MISC (miscellaneous income, rents, etc.)
1099-NEC (non-employee compensation)
1099-R (retirement)
1099-INT (interest)
1099-DIV (dividends)
1099-B (brokerage sales)
1099-G (State Tax Refund or unemployment income)
1099-K (income from credit card transactions)
SSA-1099 (social security)
1099 (any other)
1095-A (health insurance from the Marketplace) 1095-B, or 1095-C (health insurance from Employer)
1098 (mortgage interest)
1098-E (Student Loan interest)
1098-T (education - tuition)
Schedules K-1 (Forms 1065, 1120S, 1041)
Annual brokerage statements
8886 (reportable transactions)
Closing Disclosure, i.e., HUD-1 form (real estate sales/purchases)
Copies of any tax elections or revocations in effect
Other information statements (such as property taxes, crypto sales transactions, mileage logs)