

# Individual Income Tax Document Checklist

Use this checklist to organize documents you need for your income tax return preparation.

## Note:

1. This checklist is limited to the primary documents you may need to prepare your taxes
2. Everything found on this checklist may not apply to you

If you think there are other documents you should have or are unsure whether a document you received is required to complete your filing, check with your tax professional, the IRS or DOR.

## General information - includes documents needed for yourself, spouse and dependents

Copies of last year's federal, state tax returns

(this gives the tax preparer a list of documents they should have, but be aware that job, pay and other life changes can affect this list)

Valid photo identification (ex., driver license, Tribal ID, state ID, passport)

Social Security card

Proof of bank account(s) and routing information or blank check (for direct deposit)

IRS or Wisconsin Department of Revenue notices

Another state's tax return (if you reside in Wisconsin and earned income in a state without a reciprocity agreement with Wisconsin)

Estimated tax payment total (if you made quarterly estimated payments)

## Wage, other income forms - income from IRAs; employer-sponsored retirement plans like 401Ks, 403Bs; mutual funds, stocks, unemployment, rental income and other income sources

W-2 (employer earned income)

W-2G (gambling income)

1099\* (income from somebody other than employer)

SSA-1099 (Social Security income)

K-1 (partner's share of income, deductions, credits)

2K-1 (estate, trust income, deductions, credits)

3K-1 (Partner income, deductions, credits)

5K-1 (shareholder income, deductions, credits)

Gross receipts

## Expense related - payments or contributions that may be deductible

1095\* (health coverage)

1098\*

Contributions to EdVest or Tomorrow's Scholar college savings plans

Alimony paid or received

Childcare expenses with provider's address and Social Security number or federal employer identification number

Proof of business expenses

## Homestead - documents needed to apply for the Wisconsin homestead credit

### Homeowners:

Property tax bill

### Renters, either:

Rent certificate signed by your landlord

Unsigned rent certificate with proof of rental payment

Wisconsin Works (W-2) payment record

### Supplemental Security Income payments records from:

Social Security Administration

Wisconsin Department of Health Services

If you or your spouse are younger than age 62, provide one of the following:

Proof of earned income

Proof of disability:

Statement from Veteran's Administration certifying that claimant is receiving disability benefit due to 100 percent disability

Document from Social Security Administration stating date disability began

Statement from physician stating disability start date and whether disability is permanent or temporary

\*There are multiple types of this form number you may receive.