TAX RETURN DOCUMENTS CHECKLIST

Personal

___W2s
___1099-INT (from banks, brokerages,…etc)
___1099-DIV
___1099-SSA (Social Security benefits)
___1099-G (state refunds, unemployment,…etc)
___1099-MISC
___1099-NEC
___1099-B (sale of securities, from your broker)
___1099-S (sale of real estate)
___1099-SA (Health Savings Accounts)
___Form 1098 (Mortgage Interest)
___Form 1098-T (Tuition & fees)
___Real Estate Tax Receipts
___Personal Property Tax Receipts
___Summary of Medical and Dental expenses
___Summary of Charitable Donations
___Child Care Expenses
___IRA Contributions
___Schedule K-1s (from partnerships, trusts,…etc)

Business

___Vehicle Mileage Log
Expense details (summary):
___Travel expenses
___Association Dues
___Job-related education
___Tools

___Work clothes
Records of Income:
___Rental Income
___All other income

Questions? Just Ask:
info@neafinancial.com
870-336-4141

If you can answer "yes" to any of these questions, provide us with all related documents:

Did you have a casualty loss this year – from fire, theft or natural disaster?
Did you move your personal residence this year?
Did you sell your home during the year?
Were there any births, deaths, adoptions, divorces, or marriages in your household?
Did you receive any installment payments on property sales?
Did you receive any other income from a source not mentioned on this checklist?
Did you purchase any vehicles, furniture, equipment, or machinery for your business?
Do you work out of your home on a regular basis?

Thank you for choosing NEA Financial Services!