

**Goldman Accounting, LLC**  
**Individual Income Tax Return General Checklist**

- Change of Address, Phone Number or E-mail Address
- Change in Marital Status (Yes or No) If yes, please explain and provide divorce decree, if applicable.
- Dependent(s) (Copy of SS Card, Birth Certificate & Address Verification)
- Loss of Dependent(s) status (If applicable, list name & reason)
- IRS Identity PIN (this is a different and unique number each year), if you have enrolled in this fraud protection program
- W-2's for all jobs – please also bring your last paycheck stub(s)
- All 1099 forms received for interest, dividends, capital gains, retirement, social security, disability, unemployment, gambling winnings, etc.
- Any miscellaneous income (Yes or No) If yes, provide details
- All 1099-SA forms from Health Savings Accounts
- LLC, S-Corporation, Partnership (MLP's, Limited Partnerships), Trust, or Estate Sch. K-1's
- Do you have any Foreign Financial Accounts located in a another country? If yes, please list
- IRA contributions (Yes or No) If yes, provide statement
- Have you converted any retirement funds to a ROTH IRA?
- Education expenses and/or interest (Yes or No) If yes, provide statement(s) – Forms 1098-T, 1099-Qs, 1098-Es
- Sale or purchase of any property (Yes or No) If yes, please provide all closing statements
- Involved with a business or hobby (Yes or No) If yes, please explain
- Sales on internet – Ebay, etc. (Yes or No) If yes, please list
- Do you own/hold any type of Digital Assets? If yes, provide details and/or 1099's
- Have you had any gambling winnings (incl online gambling – fantasy sports betting, etc.) not reported on a Form W-2G? If yes, please list
- Did you work out of the state? (Yes or No) If yes, list state & related job
- Any estimated tax payments made? (Yes or No) If yes, list dates & amounts
- Receipts for monetary donations to public charities
- December loan statement for brand new vehicle purchased and the vehicle VIN (you must be original owner in 2025 or later and vehicle must be US assembled)

This list is not intended to be all inclusive, please address any changes or information not listed with me.

All income is taxable regardless of amount.

All income is taxable even if not reported to you on a Form W-2 or Form 1099.