

Donohue Financial Services
303 W. Allegheny Ave
Towson, MD 21204
410-560-2430

Tax Return Checklist

- ___ All W-2's
- ___ 1099's (retirement (R), dividend (D), interest (INT), MISC, SSA)
- ___ A voided check or account information for direct deposit of refund
- ___ Stock Transactions
- ___ Partnership K-1's
- ___ Real Estate Tax and Mortgage Statement
- ___ Closing statements on real estate transactions (HUD-1)
- ___ If your child is in daycare, you need the address and Tax ID # of the provider.
- ___ The names, social security numbers and date of birth for each dependent or child
- ___ Amount of estimated payments made for taxes (if any)
- ___ 1095 Health Coverage
- ___ Employee Business Expenses, Home Office Expenses
- ___ Charitable Contributions
- ___ Amount of Post-Secondary tuition and fees plus amounts paid for mandatory books or course materials.
- ___ Student loan interest paid
- ___ IRA, KEOGH & SEO Contributions

- ___ Copy of driver's licenses for the taxpayer and spouse (for joint returns)
- ___ Third party payment transactions 1099-K
- ___ Any crypto currency transactions