



Individual Tax Return Document Checklist

TAX YEAR 2026

Use this checklist to help gather documents that may be needed to prepare your individual income tax return. Not every item will apply to every taxpayer.

1. GETTING STARTED

- ☐ Copy of your prior-year federal, state and local tax returns (new clients)
- ☐ Government-issued photo identification (new clients)
- ☐ Social Security cards or other taxpayer identification documentation (new clients and new dependents)
- ☐ Any IRS, Pennsylvania or local tax notices received during the year

2. INCOME DOCUMENTS

- ☐ Form W-2 - wages and salaries
- ☐ Form 1099-NEC / 1099-MISC - nonemployee and other income
- ☐ Form 1099-INT - interest income
- ☐ Form 1099-DIV - dividend income
- ☐ Form 1099-B - stocks, investments and other securities transactions
- ☐ Form 1099-R - pensions, retirement plans and IRA distributions
- ☐ Form SSA-1099 - Social Security benefits
- ☐ Form 1099-G - unemployment compensation and applicable government payments
- ☐ Schedule K-1 - partnership, S corporation, estate or trust income
- ☐ Form 1099-K, if received
- ☐ Any other income documents received

3. ADJUSTMENTS & POTENTIAL DEDUCTIONS

- ☐ Form 1098 - mortgage interest
- ☐ Real estate tax information, if not reported on Form 1098
- ☐ Charitable contribution records
- ☐ Medical and dental expenses, if significant
- ☐ Student loan interest statement
- ☐ IRA and other qualifying retirement contributions
- ☐ HSA documents, including Forms 1099-SA and 5498-SA
- ☐ Educator expenses, if applicable
- ☐ Other potentially deductible expenses

Not sure if you need something?

Bring the document with you. School Creek Taxes can determine whether it is relevant to your return.



4. CHILDREN, DEPENDENTS & EDUCATION

- ☐ Childcare provider's name, address and taxpayer identification number
- ☐ Amount paid for childcare
- ☐ Form 1098-T - tuition statement
- ☐ Records of other qualifying education expenses
- ☐ Scholarship or grant information
- ☐ Information regarding changes in dependents during the year

5. HEALTH INSURANCE

- ☐ Form 1095-A if you or a family member had Marketplace health insurance
- ☐ HSA documentation, if applicable

6. INVESTMENTS & PROPERTY

- ☐ Brokerage year-end tax statements
- ☐ Cryptocurrency/digital-asset transaction records, if applicable
- ☐ Closing statements for property purchased or sold
- ☐ Records showing the cost/basis of investments or property sold when not reported by the financial institution

7. OTHER SITUATIONS

- ☐ Estimated federal, state or local tax payments made during the year
- ☐ Records of any extension payments
- ☐ Alimony information for agreements where tax reporting still applies
- ☐ Adoption-related expense records, if applicable
- ☐ Foreign income/account information, if applicable
- ☐ Any correspondence received from a taxing authority
- ☐ Any other tax document you are unsure about - bring it along

Self-employment or rental property income?

Additional checklists are available for those tax situations.

This checklist is a general guide. Additional documents or information may be requested based on your individual tax situation.