



## Individual Tax Return Document Request List:

- Signed and dated Engagement Letter- *Compulsory, we cannot commence work on your return until received*
- Completed Client Organizer
- W-2 Forms reporting wages, salaries, tips & overtime
- 1099/1098 Forms including:
  - 1099-INT (interest earned)
  - 1099-MISC (rents & other income)
  - 1099-B (proceeds from stock sales)
  - 1099-NEC (non-employee compensation)
  - 1099-R (distributions from qualified retirement plans)
  - 1099-DIV (dividends)
  - SSA-1099 (social security benefits)
  - 1099 Consolidated (includes 1099INT, 1099DIV & 1099B versions in one document)
  - 1098-T (tuition paid)
  - 1098 (mortgage Interest)
  - 1098-E (student loan interest)
  - 5498-SA (HSA contributions)
  - 1099-SA (HSA distributions)
- Copies of canceled checks/payments to IRS and State jurisdictions for estimated tax payments made
- Retirement plan contributions (traditional, Roth, SEP and Simple IRAs)
- Settlement statements for all real estate sales & purchases
- Form K-1 showing income & loss from S-Corps, Partnerships, Estates & Trusts\*
- Purchase documents for electric vehicles acquired prior to 9/30/2025
- Charitable contribution statements and receipts for donations made to non-profit organizations
- Cost and basis information for any Restricted Stock Units (RSUs), Incentive Stock Options (ISOs) and Employee Stock Purchase Plans (ESPP) transactions
- Purchase documents for energy efficient home improvements (windows, doors, solar, etc.)
- Any tax notices received
- Copies of valid CO Driver's License (front only)

IN ORDER TO FILE BY THE DUE DATE OF APRIL 15, 2026, PLEASE FORWARD ALL DOCUMENTS, ORGANIZER AND SIGNED ENGAGEMENT LETTER TO OUR OFFICE PRIOR TO MARCH 6, 2026.

**Packets received after March 6<sup>th</sup>, 2026 may necessitate an extension.**

\*If K-1 Forms are the only data missing, please send all other data received and forward the missing K-1s as you receive them.

Please call 303.432.3346 or e-mail [JennyK@KuhlmannCook.com](mailto:JennyK@KuhlmannCook.com) with any questions or concerns.

We sincerely appreciate the opportunity to be of service and wish you a prosperous and happy new year!