

TAX PREPARATION CHECKLIST FOR 1040 PERSONAL TAX RETURN FILERS

Getting your tax documents in order prior to filing makes it a breeze for a more efficient, less stressful tax filing experience. By taking some time to review this, you are helping us help you serve you best!

- ☒ An unexpired license or government issued ID- you'd be surprised how often this occurs and delays us in filing!
- ☐ Your Primary Income Statements: W2, 1099-NEC, 1099-K (Money Received from Online Platforms such as Amazon, TikTok, Paypal), Bank Statements
- ☐ Your Secondary Income sources such as 1099-R for Retirement Distributions (Pulling money early on from your 401k) 1099-B (Trading Platform Income Statements, Crypto Transaction Statements)
- ☐ Other Income Sources which can include: 1099-C Canceled Debt is considered income, as well as Unemployment (1099-G) or W2G (Gambling Wins)
- ☐ Applicable forms for credits such as the Child Care Credit which can include your payments statement from your child's daycare.
- ☐ Applicable forms for credits such as 1098-T Tuition Statement if you were enrolled in a qualified college, university, or vocational program.
- ☐ Your expenses and receipts if you operated a side business or owned rental property that has generated receipts and made/received payments.
- ☐ Your mortgage statement for your residential property (Form 1098), any donations made to charity organizations, & any medical/dental bills.
- ☐ Make sure to submit your Identity Protection Pins if you or any of your dependent's were issued a CP01A notice from the IRS.
- ☐ An accurate and up-to-date bank account number and account routing of where you'd like your refund dispersed to or pay out any potential IRS dues.
- ☐ Don't forget to look out in the mail for your 1095-A Marketplace Insurance if you had it. Your tax return will be rejected without it.

GET YOUR TAXES DONE RIGHT!

