

Tax Season Document Checklist

Everything to gather before your appointment — so we file accurately, maximize your refund, and avoid delays.

Marlen Bookkeeper & Tax Services, LLC · Enrolled Agents · Tax Preparation · IRS Resolution · Bookkeeping

Walking in organized is the single biggest thing you can do to lower your tax-prep stress and cost. Use this to collect your documents. You don't need to interpret them — that's our job.

Personal & Income

- Photo ID and Social Security cards for everyone on the return
- Last year's tax return (new clients)
- All **W-2s** from employers
- 1099s** — contract work, interest, dividends, retirement
- Unemployment income statements (1099-G)
- Social Security benefit statement (SSA-1099)
- Records of any other income received

Family & Credits

- Childcare provider name, address & tax ID
- Tuition statements (1098-T) and student loan interest (1098-E)
- Records of dependents' income, if any

Deductions & Adjustments

- Mortgage interest statement (1098)
- Property tax and state/local tax records
- Charitable donation receipts
- Medical & dental expense records
- Retirement contributions (IRA, SEP, etc.)
- Health insurance forms (1095-A/B/C)

Self-Employed / Small Business

- Income summary & 1099-NEC/1099-K forms
- Expense records by category
- Mileage log or vehicle records
- Home office square footage
- Estimated tax payments made during the year

Not sure if something counts? Bring it anyway. A missed form can mean a missed refund — or an IRS notice later. We'll sort what matters during your appointment.

Book your tax appointment

Bring this checklist completed and we'll handle the rest — accurately, and with every credit you qualify for.

Call/Text (865) 684-5967 · mymoluciones68@gmail.com · marlenbookkeepertax.pro

This guide is general educational information from Marlen Bookkeeper & Tax Services, LLC, not personalized tax, legal, or accounting advice. Tax rules change and apply differently to each situation. Do not act on this checklist alone — contact our office for guidance specific to you.