

LSJ Tax & Business Services

Client Tax Appointment Checklist

- Valid Photo ID (for you and spouse, if filing jointly)
- Social Security cards or ITINs for all individuals on return
- Prior year's tax return (if available)
- All income forms: W-2s, 1099s, SSA, unemployment, etc.
- Business income & expenses (if self-employed)
- Deductions: mortgage interest, student loans, tuition, childcare, donations
- Banking info for direct deposit
- EIN or LLC paperwork (if applying for business formation)
- Any IRS letters or notices

Need help gathering your documents? Contact us at 888-688-8290.