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Tax Preparation Checklist

Please have the following information and documents available to avoid any delays in your tax return processing

Personal Information

- Social Security cards for you, your spouse & dependents
- Identification Card for you & your spouse
- Birth certificate for your dependents

*** If you are claiming any children under the age of 18 bring their school transcript. For children under the age of 5 provide a medical statement with your child's name & address***

- *Bank account number & routing number for your refund Direct Deposit*

Income

- W-2 forms for yourself & your spouse from all employers
- 1099-G Unemployment, Paid Family Leave
- 1099-R distributions from retirement plans (401K plans)
- SSA-1099 Social Security Benefits received

Health Insurance

- 1099-NEC – Independent Contractors
- 1099-INT, DIV, B Investment and/or interest income
- 1095-A Health Insurance Marketplace
- 1095-B Health Insurance through a government sponsor (Medicaid)
- 1095-C Employer Health Insurance Statement

Childcare

Childcare information, Providers name, Tax ID # or Social Security Number, address, phone number & amount paid

Students – Education Credit

- 1098-T Tuition Statement
- 1098-E Student Loan Interest Statement
- *Amounts paid for tuition, activity fees, books, supplies & equipment such as laptop, printer, tablet, school supplies*

Homeowners

- 1098 Mortgage Statement
- Real Estate / Property Taxes
- Medical, Dental & Vision expenses
- Charitable Donations
- Vehicle license fees paid (DMV fees)
- Energy saving home improvements such as: Solar Panels, exterior doors, windows & skylights, central air conditioners, water heaters, water boilers, gas heat pumps*

For any questions or concerns about your documentation, please contact us.