135 Interstate Drive
Greenville, AL 36037

DREAMLAND
TAX SERVICES

Individual Tax Client Preparation Checklist

Personal Information

1. **Identification**
   - Social Security numbers (SSNs) for you, your spouse, and dependents
   - Valid photo ID (driver's license, state ID, or passport)
2. **Previous Year's Tax Return**
   - Copy of last year's federal and state tax returns (for New Client only)

Income Documentation

1. **W-2 Forms**
   - W-2 forms from all employers
2. **1099 Forms**
   - 1099-MISC for miscellaneous income
   - 1099-NEC for non-employee compensation
   - 1099-INT for interest income
   - 1099-DIV for dividends and distributions
   - 1099-B for proceeds from broker and barter exchange transactions
   - 1099-R for distributions from pensions, annuities, retirement plans, IRAs, and insurance contracts
   - 1099-G for government payments (e.g., unemployment compensation, state tax refunds)
   - 1099-S for real estate transactions
   - 1099-K (Payment apps such as Cash App, PayPal, Venmo, Square, Stripe, etc.)
3. **Other Income Documentation**
   - Schedule K-1 for income from partnerships, S corporations, estates, and trusts
   - Form 1098 for mortgage interest paid
   - Form 1098-T for tuition payments and related educational expenses
   - Form 1098-E for student loan interest paid
   - Alimony received (for divorces finalized before 2019)
   - Rental income records
   - Self-employment income and expenses (Schedule C businesses, side income, gig work)
   - Gambling winnings (Form W-2G)
   - Foreign income documentation
   - Bank and investment statements
   - Social Security benefits statement (SSA-1099)
   - Unemployment compensation (Form 1099-G)

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Deductions and Credits Documentation

1. **Charitable Donations**
    - Receipts or acknowledgment letters from charitable organizations
    - Records of non-cash donations (e.g., clothing, household items)
    - Mileage and out-of-pocket expenses for volunteer work
2. **Medical Expenses**
    - Receipts and statements for medical and dental expenses
    - Prescription medication receipts
    - Payments to medical practitioners
    - Health insurance premiums (if not paid pre-tax)
    - Transportation costs for medical care
3. **Education Costs**
    - Form 1098-T for tuition and fees
    - Form 1098-E for student loan interest
    - Receipts for books, supplies, and equipment
4. **Other Common Deductions**
    - Mortgage interest (Form 1098)
    - State and local taxes (property taxes, state income taxes)
    - Personal property taxes
    - Casualty and theft loss documentation
    - Investment interest expenses
    - Job-related expenses (if not reimbursed by employer)
5. **Credits**
    - Documentation for education credits (American Opportunity Credit, Lifetime Learning Credit)
    - Child and dependent care expenses
    - Child Tax Credit documentation
    - Earned Income Tax Credit (EITC) documentation
    - Retirement Savings Contributions Credit (Saver's Credit) documentation
    - Energy credits documentation for home improvements
    - Documentation must support eligibility requirements for each credit claimed

Additional Information

1. **Bank Account Information**
    - Bank account and routing numbers for direct deposit of refunds
2. **Estimated Tax Payments**
    - Records of estimated tax payments made during the year
3. **Other Relevant Documents**
    - Any IRS or state tax correspondence received
    - Records of any other income or expenses that may affect your tax return

By gathering all the necessary documents and information listed above, you can ensure a smooth and efficient tax appointment. If applicable, additional information may be requested through our secure client portal.