

TAX PREP CHECKLIST



PERSONAL INFORMATION

- Full Name (Taxpayer & Spouse)
- Current Identification (Picture ID)
- SS Number or ITIN
- Date of Birth
- Email Address
- Children and Dependents (Name, SSN, DOB)
- Mailing Address
- Mobile and Contact Phone Number
- Prior Year Tax Return if available
- IPPIN Number if applicable (The IRS issues a new IPPIN # annually)
- *Note: Existing clients don't have to reshare personal information unless there's been a change.

INCOME & TAX FORMS

- W-2 wages income
- W2-G gambling and lottery winnings
- 1099-A acquisition or abandonment of secured property
- 1099-B capital gains and losses (broker/barter exchange proceeds)
- 1099-C cancellation of debt
- 1099-NEC non-employee compensation
- 1099-MISC royalties and broker payments
- 1099-G unemployment or government payments
- 1099-DIV dividends and distribution interest
- 1099-INT interest income savings bonds
- 1099-DA digital assets cryptocurrency and virtual currency
- 1099-K income from third party payment process
- 1099-R retirement benefits pensions and annuities
- 1099-S real estate transaction profits
- 1099-SA distribution from HSA health savings account
- 1099-S bonds and sale of stock
- SSA-1099 social security benefit statement
- 5498 retirement contributions
- Self-employed income
- Rental property income
- Household employee income
- Other Income: alimony, hobby, gig, tips, jury duty, awards, digital assets, freelance, cash receipts, etc.



DEDUCTIONS & CREDITS

- 1098 mortgage interest and property taxes
- 1098-E student loan interest
- 1098-T tuition and education AOTC and Lifetime Learning credit
- 1095-A marketplace health insurance
- Child tax credit
- Earned income tax credit
- Additional child tax credit
- Credit for other dependents
- Child and dependent care credit
- Charitable donations and mileage
- Medical and dental expense and mileage deductions
- Educator expense deductions
- Federal disaster deduction
- Adoption credit
- Savers credit
- Electric vehicle credit
- Solar energy panel credit
- State and local sales tax (large purchases)
- Elderly and disabled deductions
- Rental property expense and deductions
- Self-employed expense and deductions (home office and vehicle)
- Other deductions and credits: disabled home accessibility improvements, disability-related work expenses, casualty and theft losses, etc.

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