



Tax Return Filing Checklist

Any required documents not submitted will hold up the return process. If you have any questions please feel free to call, text or email. Thank you!

Please submit copies of all required documents from the list below:

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| <input type="checkbox"/> Taxpayers Driver's License | <input type="checkbox"/> Income (Ex: W-2, 1099/Self Employment Expense log or summary of income) |
| <input type="checkbox"/> All Dependents Social Security Cards | <input type="checkbox"/> Form 6417 Child Tax Credit/ |
| <input type="checkbox"/> Taxpayers Social Security Cards | <input type="checkbox"/> Healthcare Card for Taxpayer/Dependents |
| <input type="checkbox"/> Proof of residence (Ex: Lease agreement, current mail with mailing address) | |

If you own a Home:

- | | |
|---|---|
| <input type="checkbox"/> Mortgage Interest | <input type="checkbox"/> Real Estate Taxes Paid |
| <input type="checkbox"/> Insurance Premiums | <input type="checkbox"/> Energy Efficient Upgrades Receipts |
| <input type="checkbox"/> Closing Documents (If bought/sold this year) | |

If you own Rental Property:

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|--|---|
| <input type="checkbox"/> Rental Income | <input type="checkbox"/> Real Estate Taxes Paid |
| <input type="checkbox"/> Insurance Premiums | <input type="checkbox"/> Mortgage Interest |
| <input type="checkbox"/> Receipts (for repairs, upgrades, utilities) | <input type="checkbox"/> Mileage (repairs, inspections, etc.) |

If you own a Business:

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|---|---|
| <input type="checkbox"/> Tax ID | <input type="checkbox"/> Insurance Premiums |
| <input type="checkbox"/> Mileage Logs | <input type="checkbox"/> Business income and Expenses |
| <input type="checkbox"/> List of Assets and Equipment | |

Other:

- | | |
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| <input type="checkbox"/> IRA and HAS Contributions | <input type="checkbox"/> FEMA Assistance |
| <input type="checkbox"/> Adoption Expenses | <input type="checkbox"/> Educational Expenses (loan interest, tuition, supplies) |
| <input type="checkbox"/> Vehicle Purchase Sales Tax | |