CARPENTER COLLECTIVE, LLC
267-536-7556 | info@carpentercollective.org
carpentercollective.org

Tax Preparation Checklist

Personal information, household details and income records

Check each item that applies and gather records for **each tax year being prepared**. Mark items that do not apply. Additional records may be requested after review.

Client name: _____ **Tax year(s):** _____

01 Identity & residency

- ☐ Unexpired government-issued photo ID for you and your spouse, if filing jointly.
- ☐ Social Security cards or ITIN documentation for you, your spouse and dependents.
- ☐ Current address and proof of residency, such as a utility bill or lease. Include any address or state changes during the tax year.

02 Dependents & family changes

- ☐ Dependent names, dates of birth and school or medical records supporting residency, when applicable.
- ☐ Changes in marital status or dependents. If divorced or separated, provide relevant agreements, custody details and any signed Form 8332, if applicable.

03 Income documents

- ☐ Forms W-2 from all employers; Forms 1099-NEC, 1099-MISC and 1099-K, if received.
- ☐ Forms 1099-INT, 1099-DIV and investment sale records, including Form 1099-B and cost-basis information, if applicable.
- ☐ Forms 1099-R for retirement, pension or annuity distributions; SSA-1099 for Social Security benefits; Form 1099-G for unemployment benefits.
- ☐ Rental income and expense records, plus records of other income not shown on a tax form.

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Business records, deductions, health coverage and final steps

04 Business & self-employment - if applicable

- ☐ Profit and loss statement or income summary, including cash and electronic payments; business name, EIN if applicable, and business start date.
- ☐ Expense summaries with receipts, bank statements and paid invoices. Identify business expenses separately from personal spending.
- ☐ Business mileage log and vehicle information; home office details, including total home and dedicated business-area square footage, if applicable.

05 Deductions & credits - if applicable

- ☐ Mortgage interest (Form 1098), property tax records and charitable contribution records.
- ☐ Student loan interest (Form 1098-E); tuition statement (Form 1098-T) and supporting education expense records.
- ☐ Childcare expenses and provider name, address and EIN or SSN; medical and dental expense records for review.
- ☐ Retirement and HSA contribution records, if applicable.

06 Health insurance

- ☐ Form 1095-A for Marketplace coverage, including Pennie, GetCoveredNJ or Georgia Access. Include all forms and corrected versions received.
- ☐ Forms 1095-B or 1095-C, if available; self-employed health insurance premium records, if applicable.

07 Before you submit

- ☐ Prior-year tax return, IRS or state notices, and records of estimated tax payments or extension payments, if applicable.
- ☐ Bank routing and account information for direct deposit or payment, if desired. Confirm the account details are current.

Upload documents securely
carpentercollective.org/secure-document-upload
For questions or help gathering records, call **267-536-7556**.

Please use the secure portal for sensitive records. This is a document-gathering guide; providing an expense record does not establish eligibility for a deduction or credit.