

Tax Filing Documents Checklist

Please use this checklist to prepare all your needed documents before you come to tax preparer to save our time. This is a guideline which does not include all documents.

Basic Info	You	Spouse	Dependents
SSN or ITIN for everyone on the tax return	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Birth dates of everyone/ Proof of residency (school/doctor records ...)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Driver license or Photo ID for you and spouse	<input type="checkbox"/>	<input type="checkbox"/>	
Last year's tax return (if you have it)	<input type="checkbox"/>		
Bank Information (routing and account numbers for direct deposit)	<input type="checkbox"/>		
Documents Received	You	Spouse	Dependents
All Form W-2 and any Income Statement (jury duty, hobby, alimony, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Form 1099s - Unemployment Compensation (1099-G), Miscellaneous Income (1099-MISC), Retirement Plan Distribution (1099-R), Interest Income (1099-INT), Dividend Income (1099-DIV), Cancellation of Debt (1099-C), ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Form 1098-T - Tuition Statement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Form 1098-E - Student Loan Interest Statement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Form 1099-SSA - Social Security Benefit Statement	<input type="checkbox"/>	<input type="checkbox"/>	
FOR HOMEOWNERS - Form 1098 - Mortgage Interest Statement Receipt showing real estate taxes paid	<input type="checkbox"/>	<input type="checkbox"/>	
Form W-2G - Certain Gambling Winnings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expenses records	You	Spouse	Dependents
Receipt Child and dependents care expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Receipt Education expenses Form 1098-T	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Receipt Medical expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Records of Charitable donations or expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Records of any Retirement contributions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FOR HOMEOWNERS - Receipts for energy saving improvements on your home	<input type="checkbox"/>	<input type="checkbox"/>	
Affordable Care Act	You	Spouse	Dependents
Form 1095-A, 1095-B, 1095-C	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
For Self-Employed or Small business	You	Spouse	Dependents
Record of business expenses - Home Office expenses	<input type="checkbox"/>	<input type="checkbox"/>	
Record of business income	<input type="checkbox"/>	<input type="checkbox"/>	
Form 1099-MISC	<input type="checkbox"/>	<input type="checkbox"/>	
Income from outside the U.S.	<input type="checkbox"/>	<input type="checkbox"/>	

We do not share your information with anyone without your agreement.

TAX YEAR

Client's Name: _____

Contact Info: _____