

# **TAX CLIENT CHECK LIST**

## **Personal Information**

- Social Security numbers for those filing the return and dependents
- Drivers license (if filing jointly need spouse drivers license as well)
- Date of birth for those filing the return and dependents
- Bank account information (for direct deposit)

## **Income**

- W2 forms
- 1099 forms - Could include 1099-NEC 1099-MISC, 1099-K, 1099-B, 1099-C, 1099-G, 1099-R, 1099-S, 1099-SA, 1099-INT, 1099-DIV, 1099-LTC, and more...
- Alimony received
- Business income and expense report

Note: *(please email [refundmaxtax@gmail.com](mailto:refundmaxtax@gmail.com) if you need a this form)*

- Rental property income

- Deductions and Credits
- Retirement account contributions
- Charitable contributions
- Form 1098 (Mortgage Interest Statement)
- Medical expenses
- Form 1098-T and Form 1098-E for education expenses such as tuition paid and student loan information
- Child care expenses (Must include name, address, and tax ID of child care provider)
- Adoption costs
- Home office information - The square footage of the office, the date the space started being used for a home office, and utility expenses are needed to claim on tax return

## Tax Payments

- Estimated tax payments throughout the year for self-employed taxpayers
- Personal property taxes
- Real estate taxes