



TAX PREPARATION CHECKLIST / LISTA DE DOCUMENTOS

Ever Tax & Accounting Services Inc.
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PERSONAL INFORMATION / INFORMACION PERSONAL

☐	Driver License or State ID
☐	Social Security cards
☐	Date of birth
☐	Current address
☐	Phone and email

DEPENDENTS / DEPENDIENTES

☐	Social Security numbers
☐	Date of birth
☐	Relationship
☐	School information
☐	1098-T forms
☐	Daycare information
☐	Months lived with you

INCOME DOCUMENTS / INGRESOS

☐	W-2
☐	1099-NEC
☐	1099-K

■	1099-MISC
■	1099-INT
■	1099-DIV
■	1099-R
■	1099-G
■	Cash income records

SELF EMPLOYED / NEGOCIO PROPIO

■	Business income total
■	Supplies
■	Advertising
■	Insurance
■	Phone and Internet
■	Mileage
■	Equipment
■	Software

CREDITS AND DEDUCTIONS / CREDITOS Y DEDUCCIONES

■	Mortgage interest 1098
■	Property taxes
■	Charity donations
■	Medical expenses
■	Education expenses
■	Student loan interest
■	Childcare expenses
■	1095-A Health Insurance

BANK INFORMATION / INFORMACION BANCARIA

■	Routing number
■	Account number
■	Checking or Savings

OTHER / OTROS

■	Previous tax return
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■	IRS letters
■	IP PIN
■	Estimated payments

Thank you for choosing Ever Tax & Accounting Services Inc.