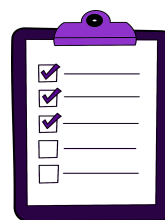


TaxMax Solutions Checklist



What to Bring to Your Appointment

- ☐ Social Security card(s)
- ☐ Driver's License(s) / State Issued ID(s)
- ☐ Dependents' Social Security numbers and dates of birth*
- ☐ W-2s
- ☐ Wage statements
- ☐ Last year's Federal and State tax return*
- ☐ Self-employment business income and expenses /1099-NEC*/1099-MISC*/1099-K*
- ☐ Commissions received/paid*
- ☐ Pension, retirement income/1099-R*
- ☐ Unemployment income/1099-G*
- ☐ Payment card & Third-party network transactions/1099-K (related to rents received or any other transactions not related to a Self-employed business)*
- ☐ Canceled Debt Amount/1099-C*
- ☐ Social Security income/SSA-1099*
- ☐ IRA contributions*
- ☐ Statements on the sales of stocks or bonds/1099-B *
- ☐ Interest and dividend income/1099-INT/1099-DIV*
- ☐ Lottery or gambling winnings/losses*
- ☐ State refund amount/1099-G*
- ☐ Income and expenses from rentals*
- ☐ Alimony paid or received*
- ☐ Record of purchase or sale of residence*
- ☐ Medical and dental expenses*
- ☐ Real estate and personal property taxes*
- ☐ State or local taxes paid
- ☐ Sales tax paid*
- ☐ Estimated taxes or foreign taxes paid*
- ☐ Cash and non-cash charitable donations*
- ☐ Mortgage or home equity loan interest paid/1098*
- ☐ Educator expenses*
- ☐ Job-related educational expenses*
- ☐ Moving expenses for member of the military*
- ☐ Tuition and Education Fees/1098-T*
- ☐ Student loan interest/1098-E*
- ☐ Childcare expenses and the provider's name, address, SSN or EIN the expenses were paid to*
- ☐ Receipt(s) for cost of resident... solar, wind, geo-thermal, heat pumps, and biomass fuel property as well as qualified windows & doors that qualify for the energy efficient home credit*
- ☐ Casualty & theft losses related to a qualified disaster*
- ☐ Form 1095-A (Health Insurance Marketplace Statement)**
- ☐ Form 1095-B/1095-C Health Coverage Statement from Insurer/Employer

*If Applicable

**If purchased health insurance through the Federal or State Marketplace

CONTACT US TODAY TO LEARN MORE!

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