

The Ultimate Tax Checklist:

Items Needed To Prepare For Your Tax Appointment



Personal Information

- Driver's Licenses for all Taxpayers
- Social Security Cards for all Taxpayers and Dependents
- Birthdates of all Dependents
- Piece of mail with Current Address(s)
- Copy of Legal Business Name (Articles of Incorporation)
- Copy of Business Tax Identification Number
- Checking Account Information
- Business Legal Documents (Articles of Incorporation)



Filed Tax Return(s)

- Prior Year Tax Returns
- Estimated Tax Return Payments & Filings
- Payroll/Employer Tax Filing
- State & Local Tax Filings



Record of All Income

- W2's for all taxpayers
- 1099 forms
- Unemployment Income
- Hobby Income
- Alimony Received
- Retirement Income (IRA, 401k, Pensions, etc)
- Rental/ Investment Income
- Proof of Sale of Stocks or other property
- Gambling Winnings
- Income from Jury Duty
- Business Checking Account Statements for Entire Year
- Cash Log of Undeposited Funds
- Monthly Business Financial Statements
- Returns, Allowances, Refunds
- Interest Earned
- Merchant Account Transaction Listings:
 - *PayPal, Cash App, Square, Stripe, Venmo, GoPayments, Etc.*



Business Expenses

Documented with business purpose, date occurred, & parties involved (If applicable)

- Home Office Information
- Vehicle Expenses for Business Use (Miles driven or actual expenses)
- Materials and supplies used for the sale of inventory
- Beginning and year-end inventory dollar amounts
- Receipts/Invoices of all purchases made
- Payments Made to Contractors
- Wages & Benefits Paid to Employees
- Insurance Premiums Paid
- Donations & Sponsorships
- Advertising & Marketing Expenses
- Office Supplies Purchased
- Travel Expenses
- Meal & Entertainment Expenses
- Any Additional Expenses Related to Operating Business



Other Items

- Record of Alimony Paid
- Charitable Donations
- Investment Expenses
- Education Payments/Expenses (Form 1098 - T)
- Student Loan Interest Paid
- Mortgage Interest
- Medical Expenses
- HSA Contributions
- Continuing Education Expenses
- Moving Expenses
- Unreimbursed Employment Expenses
- Other 1099 forms
- Child Support Paid
- Daycare/Child Care Expenses (Include Provider Number)
- If You Were Affected By A Natural Disaster:
 - City/County You Lived/Worked/Had Property In
 - Records to Indicate Property Affected
 - Records of Rebuilding/Repair Costs
 - Insurance/Claims Received
 - FEMA Assistance



Covid Related Items

- Unemployment benefits received
- Business grants received
- Business Loans Received
- Special retirement distributions made
- Letter 6419 indicating the total amount of child tax credit payments received during the year
- Amounts of Stimulus payments received

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