

# Omega Tax Solution Document Check List

Documents to provide your tax preparer to file you Federal and State income taxes.

[omegataxsolutions@accountant.com](mailto:omegataxsolutions@accountant.com)    [www.omegataxsolution.com](http://www.omegataxsolution.com)

520-800-2050

## DOCUMENTS

- Driver's License, State ID, Passport (Valid, not Expired)
- Social Security Card(s)
- W-2, 1099NEC, 1099MISC
- Proof of residence (Utility Bill, Lease Agreement, Mortgage Statement)

## PROOF OF DEPENDENT(S)

- Report Card/School Records
- Birth certificate(s)
- Social Security Card(s)
- Immunization Card(s)

## PROOF FOR SCHEDULE C (SELF EMPLOYMENT)

- DBA, Articles of Inc.
- Business Bank Statements
- Receipts
- Expense Report

## ITEMS FOR ITEMIZATION SCHEDULE A

- Mortgage statement 1098-M
- Receipts for paid medical expenses
- Donation receipts, Tithing statements to non-profit organizations
- Medical premiums paid for Health, Dental, Vision, or LTC
- Excise tax documents or receipts
- Receipts for property tax (Residential, Real Property, Vehicle Registration, etc)



## DOCUMENTS

### DOCUMENTS NEEDED FOR COLLEGE STUDENTS AOTC

- Tuition statement 1098-T
- Receipts for educational expenses (Books, Laptop, Extra Curriculum Credits, ETC)
- Student loan payments 1098-E

### ADDITIONAL MISC DOCUMENTS

- HSA, HRA account statements
- IRA, 401k (Traditional, Roth) contributions
- 1099-R Distribution from pensions, annuities, retirements
- 1099-I Interest statement; 1099-D Dividends investment income
- 1099-SSA Social security, Disability income
- 1099-G Government Income, Unemployment income
- K-I Income

### COVID, CARES ACT MISC DOCUMENTS

- Proof of positive Covid test
- Proof of quarantine
- Letter 6475 Economic Stimulus payment
- Letter 6419 2021 Advance CTC

