

THE TAX OFFICE

Tax Document Checklist

This **Checklist** is not exhaustive but includes the most common tax documents and information you'll need for your tax filing.

Other documents might be required depending on your tax situation.

PERSONAL INFORMATION

- ☐ **Driver's Licenses** (For you and your spouse)
- ☐ **Social Security Numbers** or **Individual Taxpayer Identification Numbers**
- ☐ **Birth Certificates** (For New Dependents)
- ☐ **Copy of Prior Year Tax Return** (New Clients only)

INCOME INFORMATION

- ☐ **W-2 Forms** (Income Statements from all Employers and Gambling Winnings)
- ☐ **1099-B** (for Stocks / Cryptocurrency Sold)
- ☐ **1099-C** (for Cancellation of Debt)
- ☐ **1099-G** (for Unemployment Compensation)
- ☐ **1099-DIV** (for Dividend Income)
- ☐ **1099-INT** (for Interest Income)
- ☐ **1099-R** (for distributions from Pensions, Annuities, IRA's)
- ☐ **SSA-1099** (for Social Security Income)
- ☐ **Retirement Account Contributions**

BUSINESS INFORMATION

- ☐ **1099-NEC** (for Non-Employee Compensation / Independent Contractors)
- ☐ **Business Income & Expenses** (if Self-Employed)
- ☐ **Rental Income & Expenses** (For Landlords)
- ☐ **Schedule K-1 Forms** (for S-Corporation / Partnerships)
- ☐ **Record of Purchase or Sale of Residence**
- ☐ **Estimated Tax Payments** (Amounts and Dates Paid)

PERSONAL EXPENSE INFORMATION

- ☐ **1098** (Mortgage Interest and Property Tax Statements)
- ☐ **1098-E** (Student Loan Interest)
- ☐ **1098-T** (Tuition Tax Statement)
- ☐ **Education Expenses**
- ☐ **Cash & Non-Cash Charitable Donations**
- ☐ **Child Care Expenses & Provider Information**
- ☐ **Medical, Dental & Vision Expenses**

Thank you for choosing **The Tax Office** for your tax service needs. We will be preparing your Federal & State income tax returns based on the information provided by you. While we may ask for clarification on certain items, we will not audit or verify the information provided.

It is your responsibility to ensure that you provide all necessary information for the preparation of complete and accurate tax returns.

Receipts are **NOT** required. However, we recommend you retain all documents, canceled checks, and other data that support your reported income and deductions. These may be needed to prove the accuracy and completeness of your tax returns to a taxing authority.

The Tax Office

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