



Smiths Tax Service

Adulting Unlocked: Your Ultimate Tax Checklist

Taxes got you feeling like a noob? Level up your tax game with this epic checklist! We'll help you gather everything you need to slay those taxes and score that sweet, sweet refund.

Gear Up

- Grab a file folder – your tax command center.
- Find a cozy spot for it in your desk or file cabinet.

Essential Intel

- Social Security Number (SSN) (Yours, your spouse's, and any dependents)
- Government-issued ID (Driver's license or state ID)
- Bank account info (Routing and account number for direct deposit)

Show Me the Money!

- W-2 from your employer(s)
- 1099 forms (if you have side hustles, investments, etc.)
- Unemployment income (Form 1099-G)
- Records of any other income (rental, retirement, etc.)

Deduction Power-Ups

- Mortgage interest (Form 1098)
- Property tax records
- Medical expenses
- Childcare expenses
- Student loan interest
- Charitable donations

Ready to conquer your taxes? Contact Smith's Tax Service today!

The Tax Lady

720.437.9690 (text or call)

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