

✨ Individual Tax Preparation Document Checklist

To prepare your tax return accurately and on time, please gather the following documents before our appointment:

✓ Required Documents:

1. **Government Issued ID** (Driver's License or Passport)
2. **Social Security Numbers (SSN) and Dates of Birth** for all Dependents
3. **W-2 and/or 1099 Forms** (All Sources of Employment or Contract Income)
4. **Investment Income Statements** (Brokerage, Dividends, etc.)
5. **Charitable Donation Receipts**
6. **Health Insurance 1095 Form** (Marketplace or Employer Provided)
7. **Year-End Bank Statements**
8. **Copy of Last Year's Completed Tax Return**

✓ Additional Information (If Applicable):

- **List of Business Income and Expenses**

Startup expenses are tax-deductible, so please provide all records from last year.

→  **Upload Your Documents Easily** Use our [mobile app](#)

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