



# TAX PREP CHECKLIST

Please provide the following tax documents needed to prepare your return

- W2
- 1099-DIV
- 1099R
- Taxpayer's RRB-1099
- Taxpayer's SSA-1099
- 1099-Misc
- 1099-B
- K-1 Scorp
- 1098 Home Mortgage
- 1099-INT
- 1099-Comp
- W2G
- Spouse's RRB-1099
- Spouse's SSA-1099
- 1099-Q
- K-1 Partnerships
- K-1 Trusts
- 1099-G Unemployment Compensation

Please provide the following information needed to prepare your tax return

What is your current address? \_\_\_\_\_

Did your marital status change before 12/31/2023? \_\_\_\_\_

Were there any changes in dependents? \_\_\_\_\_

Did you have any child or dependency care expenses? Please include care provider's name, address, SSN, and amount.

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Did you buy or sell stocks, mutual funds, bonds, or other investment properties? \_\_\_\_\_

Did you buy, sell, or refinance your home? \_\_\_\_\_

Did you donate money, clothes, cars, or stock? \_\_\_\_\_

Did you incur any tuition or continuing education expenses? \_\_\_\_\_

Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)? \_\_\_\_\_

Did you and your dependents have health care coverage for the full-year? \_\_\_\_\_

Did you receive any of the following IRS documents? Form 1095-A, 1095-B, or Form 1095-C? If so, please send.

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Do you want to electronically file your tax return? \_\_\_\_\_

For direct deposit, please provide your bank name, routing number, and account number \_\_\_\_\_

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Please list any questions or other concerns you might have.

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