



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 12/31/2024? _____

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.

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.

Do you want to electronically file your tax return? _____

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

Please list any questions or other concerns you might have.
