



Tax Filing Document Checklist

Use this checklist to ensure we have everything needed to prepare your return

Please upload all applicable documents through your **secure client portal**. Submitting complete information helps avoid delays and follow-up requests.

Income Documents

- ☐ W-2s from all employers
 - ☐ 1099-NEC / 1099-MISC (independent contractor or freelance income)
 - ☐ 1099-INT / 1099-DIV (interest and dividends)
 - ☐ 1099-K (payment apps, online platforms, e-commerce sales)
 - ☐ Schedule K-1s (partnerships, S-corps, trusts, estates)
 - ☐ Unemployment income (1099-G)
 - ☐ Retirement income (1099-R)
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Business Owners / Self-Employed

- ☐ Profit & Loss statement
 - ☐ Business bank statements
 - ☐ Business credit card statements
 - ☐ Mileage log or vehicle expenses
 - ☐ Payroll reports (if applicable)
 - ☐ 1099s issued to contractors
 - ☐ Asset purchases (equipment, vehicles, computers, machinery)
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Deductions & Expenses

- ☐ Mortgage interest (Form 1098)
- ☐ Property tax statements

- ☐ Rental income and expense records
 - ☐ Charitable contribution receipts
 - ☐ Medical expenses (if applicable)
 - ☐ Education expenses (Form 1098-T)
 - ☐ Childcare expenses
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Personal & Family Information


- ☐ Social Security numbers (you, spouse, dependents)
 - ☐ Dependents' information (birthdates, childcare providers)
 - ☐ Health insurance forms (1095-A, 1095-B, or 1095-C if applicable)
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Life Changes (Please Tell Us If Any Apply)

- ☐ New job or job change
 - ☐ Marriage or divorce
 - ☐ Birth or adoption
 - ☐ Home purchase or sale
 - ☐ Started, closed, or sold a business
 - ☐ Moved to a new state
 - ☐ Retirement contributions or distributions
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Important Reminder

- Upload **all documents at once** when possible
 - Complete the **tax questionnaire** in full
 - Do not email tax documents for security reasons
 - Missing information is the most common cause of filing delays
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 **Next Step** Once your documents and questionnaire are submitted, our team is notified and your tax preparation process begins.