



# 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.

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## 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

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- 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.