

Tax Preparation Client Checklist

Please provide **all documents that apply to you**. Having everything ready helps us prepare your return accurately and on time.

- Please inform us of any ***life changes*** (marriage, divorce, new child, move, new business, etc.)
- Last year's tax return (federal & state), if available- **If new client only**
- Bank account & routing numbers (for direct deposit/refund or payment)
- IRS IP PIN (if issued)

Income Documents

- W-2 (wages)
- 1099-NEC / 1099-MISC (self-employment or contract work)
- 1099-INT / 1099-DIV (interest & dividends)
- 1099-R (retirement, pension, or annuity)
- 1099-SSA (Social Security benefits)
- 1099-G (unemployment or state refunds)
- K-1 (partnerships, S-corps, trusts)
- Rental income records
- Other income (prizes, gambling, alimony received, etc.)

Housing & Property

- Mortgage interest statements (Form 1098)
- Property tax statements
- Real estate purchase or sale documents
- Rental property expenses & depreciation info (if applicable) - *we can provide a worksheet for your convenience.*

Credits, Deductions & Other Items

- Childcare expenses & provider information- please provide a name, address, \$paid to each provider for each dependent
- Child tax credit / dependent info
- Charitable donation summary
- Casualty or disaster loss information
- Energy-efficient home improvement receipts
- Retirement contributions (IRA, SEP, SIMPLE)

- **Estimated tax payments made-** please provide a date, \$amount paid to each agency

Health & Insurance

- Health insurance form 1095-A (if any)
- Medical & dental expenses
- Health Savings Account forms (1099-SA, 5498-SA)

Education

- Tuition statements (Form 1098-T)
- Student loan interest (Form 1098-E)
- Receipts for books or required supplies
- Scholarship or grant information

Self-Employment / Business (if applicable) – *we can provide a **worksheet** for your convenience.*

- Income summary or bookkeeping records
- Business expenses:
 - Supplies & equipment
 - Advertising & marketing
 - Vehicle mileage or auto expenses
 - Home office expenses
 - Phone & internet
 - Insurance
- 1099s issued to contractors
- Estimated tax payments made

Other

- Foreign income or foreign accounts
- Cryptocurrency transactions
- New Client Worksheet - **If new client only**
- Copy of Driver's license/ SS card - **If new client only**