Tax Preparation Checklist

Please provide the following documents:

~Copy of last years Tax Return, Social Security Cards and Government-issued ID

~Birth dates for taxpayer, spouse and all dependents

~Bank Account Information: the routing and account number for direct deposit or withdrawal.

~IRS notices

~Details of estimated tax payments made, if any.

Income

~All Forms W-2 (wages) for taxpayer and spouse,

~1099-NEC & 1099-MISC (Contractor Income)

~SSA-1099 (Social Security)

~1099-R (distributions from IRAs or retirement plans)

~1099-INT, 1099-DIV, 1099-B (Investments, Interest & Dividends)

~1099-G (unemployment income, state and local tax refund)

~1099-K

~Schedule K-1 from partnerships, S corps, estates and trust.

~Crypto Transactions

~Miscellaneous income: Jury duty, gambling winnings (W-2G), scholarships, etc

~1099-S (Sale of Property)

Deductions and Credits

~Form 1095-A (Health insurance purchased through a public exchange marketplace)

~Student loan interest 1098-E

~Mortgage Interest Statements Form1098

~Personal Property Tax

~Real Estate Tax

~Charitable donations: records of cash and non-cash contributions

~Medical and dental expenses: total out-of-pocket cost, subject to specials rules.

~Childcare expense receipt with provider’s tax ID

~1098-T & Education expenses

~Alimony received & paid (2018 and before)

~IRA contributions made during the year

~1099-SA (Health Savings Account)