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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 special 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)