

TAX APPOINTMENT CHECKLIST

Come prepared. Leave confident.

Use this checklist to gather the documents we may need to prepare an accurate return.

TIP Bring documents for every taxpayer and dependent listed on the return.

IDENTIFICATION & HOUSEHOLD

- ☐ Unexpired driver's license or state-issued photo ID
- ☐ Social Security card or ITIN letter for each taxpayer
- ☐ Social Security card or ITIN letter for every dependent
- ☐ Dates of birth for everyone included on the return
- ☐ Last year's federal and state tax returns, if available

INCOME DOCUMENTS

- ☐ W-2 wages from every employer
- ☐ 1099-NEC, 1099-MISC, gig-work, commission, or cash income
- ☐ 1099-R pension or retirement distributions
- ☐ SSA-1099 Social Security benefits
- ☐ 1099-G unemployment compensation or state tax refund
- ☐ Interest and dividends: 1099-INT and 1099-DIV
- ☐ Investment or digital-asset sales: 1099-B and transaction records
- ☐ Rental income and expense records
- ☐ Lottery, gambling, prize, or other income records

BUSINESS & SELF-EMPLOYMENT

- ☐ Gross receipts or income summary
- ☐ Business expense totals and receipts
- ☐ Business bank and credit-card statements
- ☐ Mileage log and vehicle information
- ☐ Asset or equipment purchases and sales
- ☐ Home-office details, if applicable
- ☐ Estimated tax payment confirmations

DEPENDENTS & CHILDCARE

- ☐ Childcare provider's name, address, EIN or Social Security number, and amount paid
- ☐ Custody or residency records, if requested
- ☐ Form 8332, if applicable

HEALTH COVERAGE

- ☐ Form 1095-A if anyone had Marketplace health insurance
- ☐ HSA forms 1099-SA and 5498-SA, if applicable
- ☐ Health coverage documents if specifically requested

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Credits, deductions & final details

Not every item applies to every taxpayer. Check the sections that match your situation.

EDUCATION

- ☐ Form 1098-T tuition statement
- ☐ Receipts for required books, supplies, and equipment
- ☐ Form 1098-E student loan interest
- ☐ Educator classroom expenses, if eligible

HOME, PROPERTY & TAXES

- ☐ Form 1098 mortgage interest statement
- ☐ Real-estate and personal-property tax records
- ☐ Home purchase or sale closing documents
- ☐ Estimated federal and state tax payments
- ☐ Records of foreign taxes paid, if applicable

DEDUCTIONS & CONTRIBUTIONS

- ☐ Cash and non-cash charitable donation receipts
- ☐ Traditional or Roth IRA contribution records
- ☐ Medical and dental expense totals, if itemizing
- ☐ Eligible casualty or theft loss documentation
- ☐ Job-related expenses only when allowed for your tax situation

SPECIAL SITUATIONS

- ☐ IRS or state tax notices received during the year
- ☐ Alimony paid or received for qualifying pre-2019 agreements
- ☐ Adoption expense records
- ☐ Energy-efficient home improvement or clean-vehicle documents
- ☐ Identity Protection PIN (IP PIN) for each person issued one

REFUND OR PAYMENT DETAILS

- ☐ Bank routing and account numbers
- ☐ Voided check or bank document to confirm account information
- ☐ Preferred payment method if a tax balance is due

BEFORE YOUR APPOINTMENT

- ☐ Upload clear, complete copies through the secure portal.
- ☐ Include every page of multi-page tax documents.
- ☐ Make a list of questions you want to discuss.
- ☐ Let us know about major life changes: marriage, divorce, a new child, a move, a home sale, or a new business.

A quick note

This is a general checklist. Your tax professional may request additional documents based on your return. Missing or incomplete information can delay preparation and filing.