ELITE PRO TAX
FINANCIAL SERVICES
COMMITTED TO SOLUTIONS

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.

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