

TAX DOCUMENT CHECKLIST

The following documents are needed to file your tax return.

PERSONAL INFORMATION

- ☐ Government-issued Photo ID
- ☐ Social Security cards, ITIN letters, IP PIN (taxpayer, spouse, dependents)
- ☐ Dates of birth for all dependents
- ☐ Current address, phone number, and email
- ☐ Bank name, account & routing number (direct deposit or payment)
- ☐ Prior-year tax return

INCOME (any that apply)

- ☐ W-2s (all employers)
- ☐ Any 1099's received
- ☐ Rental income records
- ☐ Gambling winnings (W-2G)
- ☐ Cryptocurrency transactions

BUSINESS/SELF-EMPLOYED

- ☐ Income records (cash, checks, Zelle, Cash App, Venmo, PayPal, etc.)
- ☐ Equipment or vehicle purchases
- ☐ Prior-year depreciation schedules (if applicable)
- ☐ Expense records including:
 - Supplies
 - Mileage or vehicle expenses
 - Home office
 - Phone & internet
 - Software & subscriptions
 - Insurance
 - Meals & travel

CREDITS & DEDUCTIONS

- ☐ Childcare expenses information
- ☐ Education expenses (Form 1098-T)
- ☐ Student loan interest (Form 1098-E)
- ☐ Charitable donations
- ☐ Medical expenses (if significant)
- ☐ Clean Energy upgrades receipts

HOMEOWNERS

- ☐ Property tax bill
- ☐ Mortgage Interest Statement (Form 1098)
- ☐ PMI amounts, escrow taxes, lender EIN
- ☐ Prior-year mortgage or escrow adjustments
- ☐ Records for home purchase or sale (if applicable)

HEALTH INSURANCE

- ☐ Marketplace insurance form (Form 1095-A)

IMPORTANT LIFE CHANGES

- ☐ Marriage or divorce
- ☐ New child or dependent
- ☐ Moved to a different state
- ☐ Bought or sold a home
- ☐ Started, changed, or closed a business

NEW CLIENTS ONLY

- ☐ Last 1–2 years of tax returns
- ☐ IRS or state tax notices (if any)