

# 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)