Tax Document Checklist

Every tax situation is unique, but the checklist below will help you gather the information and documents commonly needed for your return.

If you're unsure about a particular form, your preparer will review it with you during your appointment.

Personal Information

- Photo identification (driver's license, passport, or government-issued ID)
- Social Security cards or Tax ID numbers for all filers and dependents
- Dates of birth for all dependents
- Identity Protection PIN (if issued by the IRS)
- Bank routing and account number for direct deposit or electronic payment
- Residency or foreign reporting information, if applicable

Dependent Information

- Birth certificates or proof of relationship, if applicable
- Childcare provider information (name, address, and provider's tax ID number)
- Amounts paid for childcare and any dependent care benefits received
- Income of dependents or other adults in the household
- Form 8332 (if claiming a child released by a custodial parent)

Income Documents

Employment

- Forms W-2 from all employers

Unemployment

- Form 1099-G reporting unemployment compensation

Self-Employment

- Forms 1099-NEC or 1099-MISC
- Business income records not reported on 1099s
- Records of expenses (receipts, bank or credit card statements)
- Asset information for depreciation (cost and date placed in service)
- Home office information, if applicable
- Record of estimated tax payments (Form 1040-ES)

Rental Income

- Income and expense records for rental properties
- Asset information for depreciation (cost and date placed in service)
- Record of estimated tax payments (Form 1040-ES)

Retirement Income

- Form 1099-R for pensions, IRAs, or annuities
- Social Security income (SSA-1099 or RRB-1099)
- Traditional IRA basis (contributions already taxed)

Investments, Savings & Dividends

- Forms 1099-INT, 1099-DIV, 1099-OID for interest and dividends
- Forms 1099-B or 1099-S for sales of stocks, bonds, or property
- Records showing cost basis and acquisition dates for sold assets
- 1099-SA or 1099-LTC for HSA or long-term care reimbursements
- Cryptocurrency transaction records
- Record of estimated tax payments (Form 1040-ES)

Other Income

- 1099-K (payment card or third-party network transactions)
- W-2G for gambling winnings and expense records
- Jury duty, hobby income, prizes, or awards
- Trust or royalty income (Form 1099-MISC)
- Alimony paid or received (include ex-spouse's name and SSN)
- State tax refund information

Deductions and Credits

Home & Vehicle Ownership

- Form 1098 for mortgage interest
- Property and real estate tax records
- Receipts for energy-efficient home improvements

- Electric vehicle purchase documentation
- Other 1098-series forms

Charitable Contributions

- Receipts for cash and non-cash charitable donations
- Mileage records for charitable or medical travel

Medical Expenses

- Records of out-of-pocket payments for healthcare, insurance, doctors, or hospitals
- Qualified insurance premiums paid outside employer plans or the Marketplace

Health Insurance

- Form 1095-A (if enrolled through the Marketplace)

Childcare Expenses

- Fees paid to daycare or babysitter for children under 13
- Dependent care flexible spending account statements

Education

- Form 1098-T from educational institutions
- Receipts for qualified education expenses
- Records of scholarships, grants, or fellowships

- Form 1098-E for student loan interest

Educators (K–12 Teachers)

- Receipts for classroom supplies or materials

State & Local Taxes

- Records of state/local income or sales taxes paid
- Vehicle sales tax or personal property tax invoices

Retirement & Savings

- Form 5498 for IRA contributions
- Form 5498-SA for HSA contributions
- Other 5498-series forms (5498-QA, 5498-ESA)

Disaster or Special Circumstances

- Address of property affected by a federally declared disaster
- Documentation of property losses, repairs, and insurance reimbursements
- FEMA or other disaster-assistance information

Business or Corporate Clients (if applicable)

- Year-end profit and loss statement and balance sheet
- Records of business income, expenses, assets, and depreciation
- Payroll reports and 1099s issued to contractors

- Business-use vehicle mileage logs
- Prior-year tax return

Helpful Tip

Upload all documents through your secure client portal under **"Files to Tax Preparer."** Scanned copies or clear photos are accepted. If you're unsure what to include, message us directly through the portal or call the office for guidance.