Tax Document Checklist

Gather these items before your appointment.

Personal

- ☐ Government-issued photo ID (taxpayer & spouse)
- ☐ Social Security cards / ITINs for everyone on the return
- ☐ Dates of birth for all dependents
- ☐ Prior-year tax return
- ☐ Bank routing & account number for direct deposit

Income

- ☐ W-2 forms from all employers
- ☐ 1099-NEC / 1099-MISC / 1099-K (self-employment, gig work)
- ☐ 1099-INT, 1099-DIV, 1099-B (interest, dividends, investments)
- ☐ 1099-R / SSA-1099 (retirement, Social Security)
- ☐ 1099-G (unemployment, state refunds)
- ☐ Records of any other income

Deductions & Credits

- ☐ Form 1098 mortgage interest & property tax statements
- ☐ Form 1098-T tuition and 1098-E student loan interest
- ☐ Childcare provider name, address, EIN and amount paid
- ☐ Form 1095-A (Marketplace health insurance)
- ☐ Charitable donation receipts
- ☐ HSA / IRA contribution statements

Business (if self-employed)

- ☐ Income records and profit & loss summary
- ☐ Expense receipts by category
- ☐ Vehicle mileage log
- ☐ Home office square footage and expenses

☐ Estimated tax payments made during the year