

> Prepping for Taxes

DOCUMENT CHECKLIST

Client Information

Personal Information

- Name (s)
- Social Security Numbers
- Dates of Birth
- Marital Status

Dependents

- Name (s)
- Social Security Numbers
- Dates of Birth

Other

- Prior Year Tax Return
- Drivers Licenses
- Direct Deposit Information

Income Sources

Earned Income

- W-2's from all employers
- 1099-MIS
- 1099-NEC

Business Income

- Business Income & Expenses
- Rental Properties

Investment Income

- K-1's
- Brokerage Statements
- Earned Interest Statements

Deductions & Credits

Itemized Deductions

- Mortgage Interest Statement
- Property Taxes
- Charitable Contributions
- Medical / Dental Expenses

Childcare & Education

- Daycare & Preschool Tuition
- Afterschool Care & Summer Camps
- 1098-T College Tuition
- College Savings Contributions

Other

- Retirement Contributions
- HSA Contributions
- Energy Efficient Home Improvements

Other Adjustments

Student Loan Interest

Unemployment Income

Gambling Winnings / Losses