

TAX PREPARATION CHECKLIST

HERE'S A CHECKLIST OF ALL DOCUMENTS NEEDED TO FILE WITH YOUR TAX RETURN.

- **Last year's Tax Return- (New Clients Only)**
- **Unexpired Driver's License/ID Card** (Taxpayer & Spouse)
- **Social Security Card** (Taxpayer & Spouse/Phone Numbers/Email Addresses)
- **Dependent information** (DOB/SSC/SSN/Birth Certificate/Dependent Care Info)
- **Income Statements** (W2's/1099's/Unemployment/SSI/Rental Income/Foreign Income/Alimony)
- **Business owner** (DBA/LLC/EIN Number)
- **Business Expenses** (Profits & Losses Statement/Spreadsheets)
- **Direct Deposit Information** (Routing & Account Number) ****Pre-paid Cards Available****
- **Medical/Dental** (Bills/Expenses/Mileage Log) *1095A (market place insurance form) -REQUIRED*
- **Mortgage** (1098A/Home Equity Loan Interest/Mortgage Insurance)
- **Property/Real Estate Taxes Paid**
- **Education Forms** (1098T/1098E/Materials Purchased)
- **Charitable Contributions** (Cash/Non-Cash)
- **Residential Energy Credit** (Purchase Receipt)
- **Electronic Vehicle** (Credit Info from Dealer)
- **IRA Contributions/Retirement Contributions**