

GET READY FOR TAX SEASON



What you need to gather before you file:



Income Documents

- ☐ All Brokerage Consolidated & Other Income Forms (e.g. 1099s - R, INT, DIV, B, DA, SSA, NEC, MISC, 5498, K-1, etc.)
- ☐ Freelance / Contract work (even if no 1099 received)
- ☐ Rental income records
- ☐ W-2 Forms
- ☐ Crypto activity



Self-Employed / Business Owners

- ☐ Home office expenses
- ☐ Business mileage log
- ☐ Equipment or software purchases
- ☐ Health insurance premiums paid personally
- ☐ Records of estimated tax payments made



Payments & Accounts

- ☐ Bank account and routing numbers (for refunds / direct debit)
- ☐ Last year's tax return
- ☐ IRS Identity Protection PIN (if issued)
- ☐ Marketplace Health Insurance Form 1095-A



Deductions & Expenses

- ☐ Dependent care expenses
- ☐ College tuition payments (Form 1098-T)
- ☐ HSA contributions and distributions
- ☐ Retirement contributions (IRA, SEP, etc.)
- ☐ Out-of-pocket medical expenses (if significant → must exceed 7.5% of AGI)
- ☐ Charitable donations (cash and non-cash items with receipts)
- ☐ Job search expenses (if applicable)
- ☐ Educator expenses (for teachers)
- ☐ Student loan interest statements (Form 1098-E)
- ☐ Mortgage interest (Form 1098)
- ☐ Property tax payments
- ☐ Energy-efficient home improvement receipts
- ☐ EV purchase credits / American-Assembled Vehicle Interest Deduction



Key To Basic Income Forms

- R - Distributions from Retirement Plans
- INT - Interest Income
- DIV - Dividend Income
- B - Proceeds from Brokerage Transactions
- DA - Digital Assets Proceeds
- SSA - Social Security Benefits Statement
- NEC - Non-Employee Compensation
- MISC - Miscellaneous Income
- 5498 - IRA Contribution / End of Year Balance
- K-1 - Pass-Through Entity Income