

## ● Client Resource

# Tax Prep Document Checklist

Gather what applies to your situation before your appointment. Nothing here is required all at once, bring what you have and we'll help you track down the rest.

## Required Documents to Keep on File

- ☐ Copies of driver's license or state ID, for you and your spouse
- ☐ Social Security cards for everyone on the return
- ☐ Proof of residence for dependents claiming the Earned Income Credit

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## Income Documents

- ☐ Forms W-2 for you and your spouse
- ☐ Investment income — forms 1099 (-INT, -DIV, -B, etc.), K-1s, stock option information
- ☐ State/local refunds or unemployment — forms 1099-G
- ☐ Taxable alimony received
- ☐ Business or farming income — profit/loss statement, capital equipment information
- ☐ Home office use — home size, office size, home and office expenses
- ☐ IRA/pension distributions — forms 1099-R, 8606
- ☐ Rental property income/expense — profit/loss statement, suspended loss information
- ☐ Social Security benefits — forms SSA-1099
- ☐ Sales of property — original cost and improvements, escrow closing statement, cancelled debt (form 1099-C)
- ☐ Prior-year installment sale info — form 6252, principal/interest collected, payer's SSN and address
- ☐ Other income — jury duty, gambling winnings, Medical Savings Account (MSA), scholarships, etc.

**Checking on a Refund?**

Visit [irs.gov](https://irs.gov) or use the IRS Get Refund Status tool, or call the IRS directly at (800) 829-1040.

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**Other Tax Documents**

- ☐ IRA contributions
- ☐ Energy credits
- ☐ Student loan interest
- ☐ Medical Savings Account (MSA) contributions
- ☐ Self-employed health insurance payments
- ☐ Keogh, SEP, SIMPLE, and other self-employed pension plans
- ☐ Deductible alimony paid
- ☐ Educator expenses
- ☐ State, local, real estate, and personal property taxes paid
- ☐ Estimated tax payments, prior-year refund applied, or extension payments made
- ☐ Direct deposit routing and account numbers
- ☐ Foreign bank account information — location, bank name, account number, peak value during the year

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**Tax Deduction Documents**

- ☐ Child care costs — provider's name, address, tax ID, and amount paid
- ☐ Education costs — form 1098-T, education expenses
- ☐ Adoption costs — child's SSN, legal, medical, and transportation costs
- ☐ Home mortgage interest and points paid — form 1098
- ☐ Investment interest expense
- ☐ Charitable donations — cash amounts, value of donated property, miles driven, out-of-pocket expenses
- ☐ Casualty and theft losses — amount of damage, insurance reimbursements

☐ Medical and dental expenses

### Not Sure What You Need?

Book a consultation — one conversation, in English or Spanish, and we'll tell you exactly what to bring.

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