



Name: \_\_\_\_\_

Phone#: \_\_\_\_\_

Date: \_\_\_\_\_

Tax Year: \_\_\_\_\_

## Tax Preparation Checklist

Hi, in order to help streamline your tax preparation process, below are a list of documents necessary for preparing and filing your tax returns efficiently. Please read over each one carefully and gather all document(s) that apply to you prior to your tax consultation. If you have a spouse and/or dependent(s) please gather their information as well. Once you have these document(s), please **check the box(es) that apply to your tax preparation situation**, sign and date the document.

**IDENTIFICATION PURPOSES: PLEASE HAVE THESE ITEMS AVAILABLE FOR TAX FILING PURPOSES**

\_\_\_\_ Driver's License (Please make a copy, **DO NOT** email this)

\_\_\_\_ Social Security Number (Make a copy, **DO NOT** email this)

\_\_\_\_ Bank information: Name, Routing, Checking or Saving Account. If you receive a refund it will be deposited directly into your bank account.

**TAX DOCUMENTS:**

\_\_\_\_ W-2's (You, or You and your Spouse) – How many? \_\_\_\_\_

\_\_\_\_ 1099-MISC or NEC (independent contractor, self-employed) – How many? \_\_\_\_\_

\_\_\_\_ 1099-R (IRA's or Retirement plans: pensions or annuities)

\_\_\_\_ 1099-G (Unemployment income, state or local tax refunds)

\_\_\_\_ 1099-C (Cancellation of debt) – How many? \_\_\_\_\_

\_\_\_\_ 1099-INT, DIV, B, or K-1 (Investment or interest income) – How many? \_\_\_\_\_

\_\_\_\_ 1099-SSA (Social Security Benefits)

\_\_\_\_ Business, rental property or farming income (Profit/Loss statements)

\_\_\_\_ Miscellaneous income; e.g., jury duty, gambling winnings, Medical Savings, etc.

*"Thank you for choosing WB Accounting Services to assist you with your financial needs!"*



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**ADDITIONAL INFORMATION:**

\_\_\_ CHILDREN OR DEPENDENTS – HOW MANY? \_\_\_

**ANY OTHER INFORMATION, COMMENTS, OR EXPLANATIONS RELATED TO FILING YOUR TAX RETURN:** \_\_\_\_\_

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