



Name: \_\_\_\_\_  
Phone#: \_\_\_\_\_  
Date: \_\_\_\_\_  
Tax Year: \_\_\_\_\_

## Tax Preparation Checklist

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 ALL of your document(s), please check the box(es) that apply to your tax preparation, sign and date the document.**

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

\_\_\_ Driver's License (**DO NOT** email this) - (**FIRST TIME CLIENTS – ONLY**)

\_\_\_ Social Security Number (**DO NOT** email this) - (**FIRST TIME CLIENTS – ONLY**)

\_\_\_ Bank information: Name, Routing, Checking or Saving Account. If you receive a refund it will be deposited directly into your bank account - (**FIRST TIME CLIENTS – ONLY**)

**TAX DOCUMENTS:**

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

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

\_\_\_ 1095-A – HEALTH INSURANCE MARKETPLACE STATEMENT

\_\_\_ 1098 – MORTGAGE INTEREST STATEMENT – HOW MANY? \_\_\_\_\_

\_\_\_ 1099-C - CANCELLATION OF DEBT – HOW MANY? \_\_\_\_\_

\_\_\_ 1099-D - CAPITAL GAINS TRANSACTIONS - HOW MANY? \_\_\_\_\_

\_\_\_ 1099-G – UNEMPLOYMENT INCOME, STATE or LOCAL TAX REFUNDS - HOW MANY? \_\_\_\_\_

\_\_\_ 1099-K – THIRD PARTY PAYMENT PROCESSORS - HOW MANY? \_\_\_\_\_



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**ADDITIONAL INFORMATION:**

\_\_\_\_ 1099-R - IRA's or RETIREMENT PLANS: PENSION or ANNUITIES - HOW MANY? \_\_\_\_

\_\_\_\_ 1099-S – PROCEEDS FROM REAL ESTATE TRANSACTIONS - HOW MANY? \_\_\_\_

\_\_\_\_ 1098-T - TUITION STATEMENT – HOW MANY? \_\_\_\_

\_\_\_\_ 1099-MISC or NEC - INDEPENDENT CONTACTOR, SELF-EMPLOYED – HOW MANY? \_\_\_\_

\_\_\_\_ SCHEDULE K-1 (PARTNERSHIP, S-CORP, & C-CORP INCOME – HOW MANY? \_\_\_\_

\_\_\_\_ CASULTIES AND THEFTS – PERSONAL PROPERTY (NATIONAL DISASTER LOSS)

\_\_\_\_ RESIDENTIAL ENERGY EFFICIENCY HOME IMPROVEMENTS (e.g. SOLAR PANEL, DOORS, WINDOW)

\_\_\_\_ ELECTRIC VEHICLE, CLEAN VEHICLE, OR PLUG-IN ELECTRIC VEHICLE

ARE THERE ANY OTHER TAX RELATED DOCUMENTS OR FORMS THAT YOU RECEIVED THAT WAS NOT MENTIONED ABOVE? (PLEASE LIST). \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_

IS THERE ANY OTHER INFORMATION THAT WE NEED TO KNOW RELATED TO FILING YOUR TAX RETURN?

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

PRINT: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

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