TAX SEASON DOCUMENT CHECKLIST

NEW CLIENTS (these documents will be copied and returned to you while you are in our office.)

- **Social Security Cards for ALL individuals listed on the return**
- **Birth Certificates for ALL dependents (children and adults)**
- **Federal & State tax return from the last year**
- **Any current correspondence or notices from the IRS or State Agencies**

NEW & RETURNING CLIENTS

- **Drivers Licenses for Taxpayer (& Spouse)** – for security verification to prevent fraud (REQUIRED)
- **Birth Certificates for any new dependents**
- **Death Certificate** for a spouse or child that has passed away during the tax year
- **Bank account verification for Direct Deposit – Please bring a voided check**
- Change in dependents and their status
- **W-2's, 1099's**, and any other compensation forms received (Must be mailed to you by Jan 31)
- **Unemployment Income Form – 1099-G** – Available ONLINE only in your unemployment account
- **Small Business/Side Gig** – Income and expenses, mileage log
- **1099-INT/1099-DIV** – Interest Statement/Dividend statement
- **1099-B** – Proceeds from broker and barter exchange transactions (sale of stocks, etc)
  - **NOTE:** 1099-B's must be sent to you by Feb 15th. You will also need your cost basis in the asset if it is not listed with the sale. This is required to finish your return.
- **Schedule K-1** from S-Corp, Partnerships, Estates, Etc
- **Rental property income and expenses**
- **Itemized Deductions** (if applicable)
  - Dental/Medical/Long Term Care & Health Insurance Premiums
  - Real Estate Taxes – Property taxes
  - Mortgage Interest – Form 1098
  - Charitable Contributions
  - Any losses due to casualty/theft, insurance reimbursements received
  - Unreimbursed employee expense including work related entertainment, travel, meals and education (DEDUCTIBE FOR STATE ONLY)
- **IRA Contributions** - (Roth & Traditional)
- **Higher Education Expenses** - for taxpayer and/or dependents
  - Form 1098-T from colleges and universities – this can be found in the students online school portal
  - Receipts for qualifying education expenses (ie. textbooks, lab equipment, etc)
- **Student Loan Interest** – From 1098-E from lenders – most are available online only
- **HUD-1 and Closing statements** - for all Property/Real Estate Sales and Purchases

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