



Tax Preparation Checklist

<u>Category</u>	<u>Item</u>
Personal Information	<input type="checkbox"/> Photo ID/Work Permit
Personal Information	<input type="checkbox"/> Social Security card / ITIN letter (you, spouse, dependents)
Personal Information	<input type="checkbox"/> Bank account & routing number or voided check
Personal Information	<input type="checkbox"/> Prior year tax return if you have a rental home or a business.
Personal Information	<input type="checkbox"/> Identity Protection PIN (IP PIN), if issued
Personal Information	<input type="checkbox"/> Dependent Requirement ** See Below **
Income	<input type="checkbox"/> W-2 forms from all employers
Income	<input type="checkbox"/> Forms 1099-NEC / 1099-K (if self-employed)
Income	<input type="checkbox"/> Interest & dividends Forms (1099-INT / 1099-DIV)
Income	<input type="checkbox"/> Unemployment (1099-G)
Income	<input type="checkbox"/> Retirement or pension income forms (1099-R / SSA-1099)
Income	<input type="checkbox"/> Rental, stock, crypto, gambling income forms (W2G)
Expenses & Deductions	<input type="checkbox"/> Business expenses
Expenses & Deductions	<input type="checkbox"/> Mortgage interest (Form 1098) & property taxes
Expenses & Deductions	<input type="checkbox"/> Residential energy efficient receipts (Solar panels, windows, etc)
Expenses & Deductions	<input type="checkbox"/> Student tuition (1098-T) & student loan interest (1098-E)
Expenses & Deductions	<input type="checkbox"/> Childcare expenses & provider info
Expenses & Deductions	<input type="checkbox"/> Charitable donations
Expenses & Deductions	<input type="checkbox"/> Medical & dental expenses
Health & Notices	<input type="checkbox"/> Health Insurance Marketplace Obamacare (Form 1095-A)
Health & Notices	<input type="checkbox"/> IRS or state tax notices

DEPENDENT REQUIREMENT

We apologize for the inconvenience, but for **EACH DEPENDENT** you claim (adult or child), you must provide proof that they lived with you in the U.S. for at least 6 months of the tax year. NO EXCEPTIONS.

This document must show the **dependent's name, your address, and dates of residency**.

Accepted documents (one required per dependent): school records, medical or dental records, church letter, child care records, disability statement, college records, vaccination card, or apartment/lease contract.

Thank you for your cooperation.