



**Tax Documents Checklist:**

- ✓ Last two years tax returns (new clients only)
- ✓ Social Security numbers and dates of birth for taxpayers and all dependents
- ✓ Wage Income – Provide ALL W-2's
- ✓ Provide all 1099's (1099-DIV, 1099-INT, 1099-C, 1099B, 1099-S, 1099-MISC for example)
- ✓ Provide all 1098's (mortgage interest 1098, student loan interest 1098)
  - Tuition 1098-T statement – include a copy of the student's account activity from the educational institution.
- ✓ Retired - Provide all SSA-1099 Forms
- ✓ Year-end statements from Mutual Funds and/or IRA's
- ✓ Notice 1444 – IRS Economic Impact Payment
- ✓ Purchase & Sale information for anything sold during the year
- ✓ Forms 1095-A, 1095-B, or 1095-C. If coverage is through Healthcare Exchange you will receive form 1095-A. Form 1095-B provided by your insurance company or 1095-C provided by your employer. Include with your documents if received.
- ✓ Property tax statements, paid and assessed
- ✓ Documents for Charitable Contributions (both monetary & property donations)
- ✓ Child Care Provider Information: Name, Address and ID#
- ✓ Copy of Social Security Cards – This applies to all NEW CLIENTS or **new additions to the family**.
  - NEW Clients it is important to have them on file to confirm information and comply with IRS requirements
- ✓ Copy of Driver's License – new security measure for all returns – used by IRS to confirm the return is not fraudulent
- ✓ All YEAR END tax documents received in the mail, including documents you are unsure of
- ✓ IF applicable:
  - Itemized Deductions
    - Medical/Dental/Vision expenses
    - State/local income taxes paid
    - Mortgage Interest
    - Real Estate & Personal Property taxes paid in 2023
    - Cash donations to charity
    - Receipts for property donated to charity
    - Gambling losses (up to amount of winnings)
  - Rental Property Activity/Real Estate Activity
    - Back Up of Accounting System Data (QuickBooks or Peachtree)
    - Excel Spreadsheet of Rental Activity, Receipts, Mileage Log
  - Schedule C – Self-Employed Business Activity
    - Back Up of Accounting System Data (QuickBooks or Peachtree)
    - Excel Spreadsheet of Business Activity, Receipts, Mileage Log
  - "S" Corporation
    - Copies of tax returns for the past three years
    - Bank Statements, Credit Card Statements
    - Back Up of Accounting System Data (QuickBooks or Peachtree)
    - Excel Spreadsheet of Business Activity, Receipts, Mileage Log