



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, 1099-B, 1099-S, 1099-MISC, 1099-NEC for example)
- ✓ Provide all 1098's (mortgage interest 1098, student loan interest 1098-E, tuition statement 1098-T)
 - Tuition 1098-T – *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
- ✓ 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 – required by all states to e-file.**
- ✓ 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