



KW TAX PROS 2025 FILING CHECKLIST

WHAT IS NEEDED TO FILE YOUR TAXES WITH KW TAX PROS

IDENTIFICATION & PROOF OF INCOME

- ✓ UNEXPIRED STATE-ISSUED ID, DRIVER'S LICENSE, OR PASSPORT
- ✓ SOCIAL SECURITY CARD OR ITIN LETTER
- ✓ W-2S, 1099S, OR 1098S
- ✓ ANY APPLICABLE IRS/STATE TAX FORMS
- ✓ PRIOR YEAR TAX RETURN (IF AVAILABLE)

PROOF OF RESIDENCY

- ✓ RECENT UTILITY BILL
- ✓ LEASE AGREEMENT OR RENTAL STATEMENT
- ✓ MORTGAGE STATEMENT OR PROPERTY TAX BILL

PROOF OF DEPENDENT RELATIONSHIP

- ✓ BIRTH CERTIFICATE
- ✓ SOCIAL SECURITY CARD
- ✓ ADOPTION OR GUARDIANSHIP PAPERS (IF APPLICABLE)

PROOF OF DEPENDENT RESIDENCY

- ✓ SCHOOL RECORD WITH ADDRESS
- ✓ MEDICAL OR IMMUNIZATION RECORD
- ✓ PHYSICIAN STATEMENT OR GOVERNMENT RECORD

PROOF OF DEPENDENT RESIDENCY

- ✓ BANK OR CREDIT CARD STATEMENTS
- ✓ BUSINESS INVOICES OR RECEIPTS
- ✓ INCOME & EXPENSE WORKSHEET (YEAR-TO-DATE)
- ✓ EIN/LLC FORMATION DOCUMENTS
- ✓ BUSINESS CARDS, FLYERS, OR WEBSITE

FILE WITH CONFIDENCE. FILE WITH KW TAX PROS.