# Tax Prep, Amendments & Extensions Checklist

## Basic Information (All Clients)

☐ Government-issued photo ID (front and back)

☐ Social Security cards for you, your spouse, and dependents

☐ Date of birth for everyone on the return

☐ Prior year’s tax return (if available)

☐ Bank account and routing number for direct deposit

## Income Documents

☐ W-2s from all employers

☐ 1099s (NEC, MISC, INT, DIV, K, R, SSA, G, etc.)

☐ Self-employment income and expenses

☐ Business income (if filing a Schedule C or business return)

☐ Rental income and expenses

☐ Unemployment income (Form 1099-G)

☐ Cryptocurrency transactions (if applicable)

☐ Any additional income (gambling, tips, hobby income, etc.)

## Deductions & Credits

☐ Childcare expenses (provider info + total paid)

☐ Education expenses (Form 1098-T and receipts)

☐ Student loan interest (Form 1098-E)

☐ Mortgage interest (Form 1098)

☐ Property tax statements

☐ Medical expenses (if itemizing)

☐ Charitable donations

☐ IRA or retirement contributions

☐ Health insurance forms (1095-A, B, or C)

## If Filing an Amendment (1040-X)

☐ Original tax return (the one being amended)

☐ Corrected or missing income documents

☐ Proof of changes (e.g., new W-2, corrected 1099, missed deduction)

☐ Explanation of the error or change

## If Filing an Extension

☐ Estimate of total income for the year

☐ Estimate of total taxes paid so far

☐ Reason for needing the extension (optional)

☐ Form 4868 for personal returns or 7004 for business returns (we’ll prepare this for you)

## Upload or Bring These Items

☐ Upload all documents to your secure client portal or bring them to your in-person appointment.

☐ We cannot file or amend your return without the proper documentation.