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What to Bring to a Tax Appointment (Tax Checklist)

Personal documents-

Bring all documents below.

☐Photo ID, Social Security Cards, Social Security Number verification letters, or Individual

☐Taxpayer Identification Number assignment letters for you, your spouse, and any dependents.

☐Birth dates for you, your spouse, and dependents on the tax return.

☐Bank account and routing number or a voided check for direct deposit of your refund.

☐Last filed tax return copy if you have them (new clients only)

☐Identity Protection PIN (IP PIN), if you have one.

Self-Employment and Regular Employment Income-

Bring all documents that apply or have them downloaded and ready to forward via email.

☐W-2 form(s) for all jobs last year (your employer(s) will have sent you this by January 31st)

☐Self-Employment Income

☐1099-NEC and/or 1099-K

☐Records of income not reported on 1099 forms.

☐Records of expenses including receipts, credit statements, etc.

☐Record of estimated tax payments

☐Retirement or Disability Benefits

☐SSA-1099 form for Social Security benefits

☐1099-R for pension/IRA/annuity income

☐Unemployment Income

☐1099-G for unemployment benefits

Other sources of income

☐1099-G for refund of state/local income taxes

☐1098-T for scholarships/fellowships

☐Income or loss from the sale of stocks, bonds, or real estate

☐Income or loss from rental property

☐Alimony received.

☐Statements for prizes or lottery/gambling winnings

☐1099-INT/1099-DIV for Interest and dividend statements from banks

☐Records for any other income

Expenses

You may be able to claim tax deductions for some of the expenses you have. These deductions reduce the income you are taxed on.
Bring documentation for all of the following expenses you have.

☐Retirement contributions, including a 401(k) or IRA.
☐State and local taxes you've paid.
☐Mortgage statements and property tax bills if you are a homeowner.
☐College tuition (Form 1098-T) and student loan statements (Form 1098-E) (This might be listed in your school account. If this is on a dependent, that student will have to log in to their account to get the information for you)
☐Childcare expenses, including payment records or receipts and provider's name, address, and federal tax ID number (either their Social Security Number or Employment Identification Number)
☐Receipts for charitable donations
☐Medical and dental bills
☐Records for supplies used as an educator.

☐***Any additional information you have not listed above pertains to your tax records.***

Questions you want to ask:

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