

Personal Tax Document Checklist

Check off what you have and bring or upload it to your secure client folder. Send what you have and let us know what's missing - we'll help you track it down.

Name: _____

Tax year: _____

Identification & Personal Info

- ☐ **Photo ID** - driver's license or passport
- ☐ **Social Security numbers / ITINs** - taxpayer, spouse, and dependents
- ☐ **Dates of birth** - for everyone on the return
- ☐ **Last year's tax return** - federal and state
- ☐ **Bank routing & account number** - for direct deposit or payment
- ☐ **IRS Identity Protection PIN** - if one was issued to you

Income

- ☐ **W-2** - wages from each employer
- ☐ **1099-NEC / 1099-K / 1099-MISC** - freelance, gig, and side income
- ☐ **1099-INT / 1099-DIV** - bank interest and dividends
- ☐ **1099-B / brokerage statement** - stock, crypto, and other investment sales
- ☐ **1099-R** - pension, IRA, and 401(k) distributions
- ☐ **SSA-1099** - Social Security benefits
- ☐ **1099-G** - unemployment or state refunds
- ☐ **K-1** - partnerships, S corps, estates, and trusts
- ☐ **Rental income & expense records**
- ☐ **Business income & expense records** - profit and loss, mileage log, home office details
- ☐ **Other income** - gambling winnings, alimony (older agreements), etc.

Deductions & Credits

- ☐ **1098** - mortgage interest
- ☐ **Property tax statements**
- ☐ **Charitable donation receipts** - plus records of non-cash donations
- ☐ **Medical & dental expenses** - if itemizing
- ☐ **1098-T** - tuition and education expenses
- ☐ **1098-E** - student loan interest
- ☐ **1095-A** - Marketplace health coverage
- ☐ **HSA statements** - 1099-SA and 5498-SA
- ☐ **Retirement contribution records** - IRA, SEP, and others

- ☐ **Child care costs** - provider's name, address, and tax ID
- ☐ **Energy credit records** - solar, EV, home improvements
- ☐ **State & local tax payments** - including estimated payments

Payments Already Made

- ☐ **Estimated tax payments** - dates and amounts, federal and state
- ☐ **Prior-year overpayment** - applied to this year
- ☐ **IRS or state notices** - received during the year

Life Changes & Other Items to Flag

- ☐ **Marriage, divorce, birth, adoption, or a death in the family**
- ☐ **Moves, job changes, or a home purchase or sale**
- ☐ **Foreign accounts or income**
- ☐ **Any IRS or state letters** - opened or unopened

Tip: Upload scans or PDFs rather than photos when possible. We will only request documents through our secure upload link. The IRS never initiates contact by text or social media.