

Tax Filing Checklist

Personal Information

- Full Legal Name of all those listed on return, including dependents
- Social Security Number for each person on the return, including dependents
Bring Copies of Social Security Cards
- Birthdate for each person on the return, including dependents
Bring Birth Certificates for dependents
- Current Mailing address
- Phone number
- Email Address

Income Statements

- W-2
- 1099-Misc/ 1099 - NEC
- Unemployment Earnings (1099-G)
- K-1
- Interest Statements (1099-INT)
- Social Security Statements (SSA-1099)
- Gambling Winnings (1099-G)
- Stock/Bonds reporting (1099-DIV, 1099-B)
- Cancellation of Debt (1099-C)
- Any other income statements or records

Expense Records

- Mileage Records
- Receipts for business expenses
- Personal Expense Records
- Medical Expense Records

Other Statements

- Student Loan Interest
- Tuition Statement (1098-T)
- Mortgage Interest Statement (1098)
- Charitable Contribution Records or receipts
- Vehicle Tab Renewals
- Daycare Expenses
- School Supply Receipts
- HAS/FSA records
- IRA Contributions (outside of payroll deductions)
- Proof of Health Insurance (1095-A, 1095-B, 1095-C)
- Certificate of Rent Paid (MN, WI residents)
- Closing Statements from home purchase
- Purchase agreement for large purchases such as: car, ATV, RV, Motorcycle

Other things to Bring

- Copy of Prior Year return (if new client)
- Direct Deposit information (Routing and Account number)
Voided Check
- Proof of eligibility to claim children (if needed)
Birth Certificate, Custody/Divorce paperwork, Adoption/Placement paperwork
- Drivers License (or other form of Identification)

The above list is not all inclusive. If you receive a form you are unsure of, please bring with