

## TAX DOCUMENT CHECKLIST FOR NEW CLIENTS

Please complete the Tax Organizer and provide a copy of your prior year's tax return.

<b>Identification</b>	<b>Education</b>
<ul style="list-style-type: none"> <li>• Driver's License/State ID</li> <li>• Social Security Card (Not required but recommended)</li> </ul>	<ul style="list-style-type: none"> <li>• 1098-T for college tuition, scholarships/fellowships</li> <li>• College Expenses/Receipts</li> </ul>
<b>Health Care/Medical</b>	<b>Miscellaneous</b>
<ul style="list-style-type: none"> <li>• Form 1095-A for Marketplace Insurance</li> </ul>	<ul style="list-style-type: none"> <li>• 1098-Int Mortgage Interest Statement</li> <li>• Daycare Statement with Tax ID and Amount Paid</li> </ul>
<b>Income Documents</b>	<b>Other sources of income</b>
<ul style="list-style-type: none"> <li>• W-2 form(s)</li> <li>• Self-Employment Income</li> <li>• 1099-NEC, 1099-MISC and/or 1099-K</li> <li>• Total business income not reported on 1099 forms</li> <li>• Total business expenses</li> <li>• Record of estimated tax payments</li> <li>• SSA-1099 form for Social Security benefits</li> <li>• 1099-R for pension/IRA/annuity income</li> <li>• IRS Economic Stimulus amount or letter</li> <li>• IRS Advance Child Tax Credit letter</li> <li>• Schedules K-1 from partnerships, S corporations, estates and trusts, and other income reporting statements, including all copies provided from the payer.</li> <li>• Foreign Earned Income/Investment Statement</li> </ul>	<ul style="list-style-type: none"> <li>• 1099-G for state refund or unemployment benefits</li> <li>• 1099-B Income or loss from the sale of stocks, bonds, or real estate</li> <li>• Income or loss from rental property statement</li> <li>• Alimony received</li> <li>• Statements for prizes or lottery/gambling winnings</li> <li>• Interest and dividend statements from banks 1099-Int</li> <li>• Records for any other income</li> <li>• 1099-C Cancellation of Debt</li> <li>• Business Profit &amp; Loss Statement</li> <li>• Business Balance Sheet</li> <li>• Any statement you receive labeled Important Tax Document</li> </ul>