

Tax season checklist. What to bring to your appointment.

Not everything applies to everyone. Bring what you have, and we will tell you if anything is missing.

Name _____

Appointment date _____

About you

- ☐ Photo ID for you and your spouse
- ☐ Social Security cards or ITIN letters for everyone on the return
- ☐ Dates of birth for your dependents
- ☐ Last year's tax return, if you are new to us
- ☐ Bank routing and account number, if you want your refund by direct deposit

Income

- ☐ W-2s from every job
- ☐ 1099 forms: 1099-NEC, 1099-K, 1099-INT, 1099-DIV, 1099-R, 1099-G
- ☐ SSA-1099, if you received Social Security benefits
- ☐ Brokerage statements and records of investment sales (Form 1099-B)
- ☐ Rental property income and expense records
- ☐ Self-employment income and expense records, and any other income

Deductions and credits

- ☐ Form 1098 for mortgage interest
- ☐ Property tax statements
- ☐ Form 1098-T for tuition and 1098-E for student loan interest
- ☐ Child care provider's name, address, tax ID and amount paid
- ☐ Receipts for charitable donations
- ☐ Form 1095-A, if you had Marketplace health insurance

Business owners

- ☐ Income and expense records, or a profit and loss statement
- ☐ Mileage log for business use of your vehicle
- ☐ 1099s you issued to contractors
- ☐ Records of equipment or other major purchases

Letters from the IRS

- ☐ Any IRS or state notices you received this year
- ☐ Records of estimated tax payments you made