

Tax Preparation Checklist:

Help us help you get your taxes done quicker.

Basics:

- W2's
- 1099's:
 - 1099-NEC (Non Employee Compensation)
 - 1099-R (Retirement)
 - SSA-1099 (Social Security)
 - 1099-G (Government payments)
 - 1099-INT (Interest)
 - 1099-DIV (Dividends & Distributions)
- 1095-A (Health Insurance through Marketplace)
- Childcare Expenses (Children under the age of 13)

If Itemizing:

- 1098 (Mortgage Interest)
- Property taxes
- Donations
- Medical/Dental

For businesses/ Self-Employed

- Profit & Loss
- Mileage

MISC:

- SSN/ DOB (For new dependents/ clients)
- Last year's tax return (New clients only)
- Bank account & routing numbers (only if you want automatic deposit and/or withdrawal set up)
- Disclosure/ Final HUD (For purchasing, selling, or refinancing home)
- Receipts of Home Improvements done (For selling of home)
- Certificate/ Purchase papers for Energy Efficient purchases (Solar Panel, hot water tanks, etc)