

# Tax Preparation - Checklist Docs

## Personal information for each Taxpayer

- ✓ SSN's card or ITIN letter
- ✓ Date of Birth
- ✓ Identity theft protection – PIN # (if applicable)
- ✓ Valid state ID, i.e. (Driver's license)

## Dependent(s)/Nondependent(s) information

- ✓ SSN, ITIN and DBO
- ✓ Childcare records - Daycare (It needs their Tax ID to be valid), if applicable
- ✓ Dependent's income, if applicable
- ✓ Form 8332 for child release claim as a dependent to the noncustodial parent, if applicable.

## Income support Docs

- ✓ Employed: W2 form
- ✓ Unemployed: 1099G State form
- ✓ Self-employed: 1099 Misc, 1099 Nec, Sch K1, expenses records (receipts & bank statements), assets information (cost, date placed in service), office at home- square footage used (if applicable), estimated tax payments (records).
- ✓ Rental Income: prove of income and expenses, assets information (cost, date placed in service), estimated tax payments (if made).
- ✓ Retirement income: IRA forms (1099R) & SSN benefits (SSA 1099 form)

## Cryptocurrency investments, stocks, interests & dividends

- ✓ Forms 1099-INT, & 1099-Div
- ✓ Forms 1099-B

## Miscellaneous income

- ✓ Gambling (W-2G)
- ✓ State tax refund

- ✓ Jury duties
- ✓ Alimony (paid/received)

**Deductions allow**

- ✓ Docs related to home ownership (1098 form)
- ✓ Expenses related to real state and personal property, i.e. improvements (receipts)
- ✓ Donations to qualify entities
- ✓ Qualify medical expenses
- ✓ MBTA or public transportation expenses
- ✓ Living Rental expenses
- ✓ Education expenses (1098T form)
- ✓ Educator expenses – (k12)
- ✓ Health savings accounts (HSA)

**Note**

If you want your refund or due amount electronically, please provide your bank account info (routing # & account #).