




Tax Prep Checklist – Interactive Version

Use this checklist to gather your documents before your appointment. Check off each item as you collect it! 



Personal Information

- Your **SSN or ITIN**
 - **Spouse's name, SSN/ITIN, and date of birth**
 - Any **stimulus payments** received
 - **Valid government ID** (needed for refund transfers/advances)
 - **IRS Identity Protection PIN** (if applicable)
 - **Current address, phone number, and email**
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Dependent Information

- **Dates of birth + SSNs/ITINs** for all dependents
- **Childcare provider info**, including tax ID
- **Income for dependents or other adults** in your home
- **Proof of residency/relationship** for non-biological dependents
- **Form 1098-T** (college students)
- **Disability documentation**, if applicable

Income Documents

Employment & Unemployment

- W-2s
- 1099-G (unemployment)

Self-Employment / Side Gigs

- Any 1099s or K-1s
- Records of all income **not on a 1099**
- Expense receipts
- Home office info (if claiming)
- Estimated tax payments

Rental Properties

- Rental income & expenses
- Asset info for depreciation

Retirement Income

- 1099-R
- Social Security statements (SSA-1099 or RRB-1099)

Investments & Savings

- 1099-INT, 1099-DIV, 1099-B, or 1099-S
- 1099-SA or 1099-LTC (HSA / long-term care)

- Investment expense records

Other Income

- Cryptocurrency transaction history
 - Gambling winnings (W-2G or other records)
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Deductions & Credits

Homeowner

- Mortgage interest (1098)
- Real estate / personal property tax receipts
- Energy-efficient home improvement receipts

Charitable Donations

- Cash and non-cash donation receipts
- Mileage logs (charity or medical)

Medical Expenses

- Out-of-pocket medical, dental, and vision costs

Health Insurance

- 1095-A (Marketplace plans only)

Childcare

- Daycare, babysitter, or after-school care receipts

- Dependent Care FSA statements

Education

- 1098-T (college tuition)
- Receipts for qualified education expenses
- 1098-E (student loan interest)
- Teachers (K–12): classroom supply receipts

State & Local Taxes

- Records of state/local tax paid
- Vehicle tax or sales tax receipts

Retirement & Savings

- Any 5498 forms (HSA, IRA, etc.)

Disaster Relief

- Documentation of property damage
- Repair/rebuild receipts
- Insurance and FEMA paperwork