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ANNUAL TAX CHECKLIST

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This Annual Tax Checklist is designed to help you gather the documents and information needed for a smooth and accurate tax filing experience. Use this guide to stay organized, avoid delays, and ensure you have everything required before your appointment or online submission.

Prepared For: ____________________________________

Tax Year: ____________________________________

Prepared By: ____________________________________

Company Name: ____________________________________

Personal Information

- ■ Social Security numbers for you, spouse, and dependents
- ■ Dates of birth for everyone included on the return
- ■ Prior-year federal and state tax returns
- ■ Driver's license or state-issued ID

Income Documents

- ■ W-2 forms from all employers
- ■ 1099-NEC or 1099-MISC for contract or freelance income
- ■ 1099-K for payment apps or online sales
- ■ 1099-INT, 1099-DIV, 1099-B for interest, dividends, or investments
- ■ 1099-R for pensions, annuities, or retirement distributions
- ■ SSA-1099 for Social Security benefits
- ■ 1099-G for unemployment or state refunds
- ■ Rental income records
- ■ Alimony received (if applicable)
- ■ Any other income statements marked 'Important Tax Document'

Adjustments, Deductions & Credits

- ■ Childcare expenses + provider's name, address, and EIN
- ■ Education expenses (Form 1098-T)

- Student loan interest (Form 1098-E)
- Medical and dental expenses
- Charitable donation receipts
- Mortgage interest (Form 1098)
- Property tax statements
- Energy-efficient home improvement receipts
- Retirement contributions (IRA, HSA, etc.)
- Adoption-related expenses

Health Insurance

- Form 1095-A (Marketplace insurance)
- Form 1095-B or 1095-C (if provided by employer or insurer)
- HSA contribution and distribution records

Home & Property

- Closing documents for home purchase or sale
- Refinance paperwork
- Property tax bills
- Home improvement receipts (if tax-related)

Life Changes

- Marriage or divorce documents
- Birth or adoption records
- Death certificate (if applicable)
- Name or address change documentation

Taxes Already Paid

- Estimated quarterly tax payments
- State/local tax payments
- Prior-year refund amount applied to this year

Additional Items

- IRS or state tax notices
- Bank account information for direct deposit
- Any document labeled 'Important Tax Document'

Ready to File? Contact Us Today.

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