

Income Tax Documentation Checklist

Filing Status and Dependent Info

- Lease Agreement/Rent Receipts
- Utility Bills

- Social Security Cards
- Birth Certificates
- Valid Driver's License or State ID**

Income Forms

- W2s
- Dividend Statements
- Bank Interest Statements
- 1099R - Retirement/Pension
- Unemployment Statements (**1099-G**)
- Social Security Statement
- 1099B - Stock/Crypto Sales
- K-1's
- W2G (**Gambling Winnings**)
- 1099A and 1099C (**Cancellation of Debt**)
- Alimony Paid/Received
- Health Insurance Forms (**Forms 95A, 95B, 95C**)

Rental Property / Airbnb

- Advertising
- Bank Statements
- Closing Statement (**new purchase or sale**)
- Credit Card Statements
- Improvements
- Inspection
- Inspection Fees
- Insurance
- Landscaping
- Legal Fees
- Maintenance/Cleaning
- Management Fees
- Mileage (**log book required for your records**)
- Mortgage Interest Statements
- Property Tax Statements
- Rental Income Received
- Repairs
- Supplies
- Utilities

Deductions and Credits

- Mortgage Interest Statements
- Property Tax Statements

- Education Expenses (Form 1098-T, Account Transaction History, and receipts for books supplies)
- Child Care Expenses (**Tax ID/SSN are required**)
- Cash Donations
- Non-Cash Donations
- IRA/Roth IRA contributions
- Health Savings Account Contributions
- Educator Expenses
- Medical Expenses
- Closing Statement (**new purchase or sale**)
- Energy Efficiency Improvements (Windows, Doors Insulation, Hotwater Heater, AC, Furnace)

Self-Employment/Gig Worker

- Equipment Purchased (amount and date)
- 1099MISC and/or Record of Income Received
- Advertising Expenses
- Auto/Equipment Repairs
- Bank Fees
- Bank statements
- Cellphone
- Contract Labor
- Fuel Expenses
- Insurance (Health or Liability)
- Legal/Professional Fees
- Interest Paid
- License Fees
- Materials
- Meals
- Mileage (**log book required for your records**)
- New/Used Equipment Purchases
- Office Expenses
- Permits and Fees
- Rent (Equipment or Facility)
- Rents
- Repairs/Maintenance
- Supplies
- Tools
- Training
- Travel
- Uniforms
- Utilities
- Wages/Commissions

Note:

- * **For stock sales bring purchase and sales price if not included on statement provided by brokerage**
- * **For Child Care Credit, bring Tax ID or Social Security number, name and address of provider**
- * **For Cash Donations a written statement/cancelled check are required for your records**
- All Deductions, Credits Claimed, Expenses and Income must be substantiated with necessary documentation if audited**
- * **Your dependent children's tax forms. We continue to have problems with Dependent Children filing their own returns and claiming themselves. This will result in issues filing your own return claiming them, so PLEASE do not let them file before you do.**