



REQUIRED TAX DOCUMENTS CHECKLIST

Please gather and present these documents.

Onboarding Forms

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- ☐ Completed Individual Tax Intake Questionnaire
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Identity Verification

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- ☐ Copy of Driver's License or State-Issued Photo ID (Taxpayer & Spouse)
 - ☐ Social Security Cards (SSN) or ITIN Letters for all listed individuals & dependents
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Prior Year Documentation

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- ☐ Copy of Prior Year Federal Tax Return (Form 1040 including all schedules)
 - ☐ Copy of Prior Year State Tax Return(s)
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Income Reporting Records

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- ☐ Forms W-2 (Wages and Earnings from employment)
 - ☐ Forms 1099-NEC / 1099-MISC (Self-employment income / independent contractor work)
 - ☐ Forms 1099-INT / 1099-DIV / 1099-B (Interest, dividends, and brokerage stock sales)
 - ☐ Forms 1099-R (Retirement account, IRA, or pension distributions)
 - ☐ Schedule K-1 (Income or losses from Partnerships, S-Corporations, or Trusts)
 - ☐ Documentation of any Cryptocurrency / Virtual Currency transactions or digital asset sales
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[	]	Form 1098 (Mortgage Interest Statement & Real Estate/Property Tax records)
[	]	Form 1098-E (Student Loan Interest Statements)
[	]	Form 1098-T (Tuition Statements / Higher Education expenses)
[	]	Form 1099-SA / Year-end HSA contribution and spending reports
[	]	Charitable donation receipts, acknowledgment letters, and logbooks
[	]	Childcare provider details (Name, address, SSN/EIN, and total amounts paid)

Please list any additional documents, unique notices, or tax items not covered above: