

Year-End Income Tax Document Checklist

	Description	✓	Required Documents
General	Dependents (NEW)		Name, Social Security # and Date of Birth
	Dependents (REMOVED)		Name
	Direct Deposit		Bank Account # and Routing #
	Driver's License		Copy of State Issued Drivers License for Taxpayer and Spouse
	Digital Assets (Virtual Currency)		Confirmation if You Received, Sold, Sent or Exchanged Digital Assets
Income	Employment Income		Form W-2
	Interest & Dividend Income		Forms 1099-INT & 1099-DIV
	Sale of Investments		Form 1099-B and Original Cost of Investments
	Self-Employed Income		Detailed Summary of Income & Expenses For Each Business (See my Year-End Documents)
	Rental Real Estate		Detailed Summary of Income & Expenses For Each Property (See my Year-End Documents)
	Pension, IRA or Retirement Income		Form 1099-R
	Social Security		Form SSA-1099
	S Corps, Partnerships or Estates		Form K-1
	Payments from Venmo, Zelle and other apps		Form 1099-K
	Gambling Income		Form W-2G
	Unemployment		Form 1099-G (Taxpayer may have to access this document online)
Deductions	Education Tax Credit		Form 1098-T Tuition Statement
	Student Loan Interest		Form 1098-E Student Loan Interest
	Medical Expenses		Out-of-Pocket Expenses and Health Insurance
	Mortgage Interest		Form 1098
	Property Taxes		Property Tax Postcard, Tax Bill or Form 1098
	Charitable Contributions		Cash or Property Donated
Other	Purchased Of New Home		HUD-1 Statement or Closing Disclosure
	Form 1099-K Offset		Form 1099-K Personal Items Sold at a Loss or Incorrect Issuance of Form 1099-K
	Sale of Previous Home		HUD-1 Statement or Closing Disclosure
	Subsidized Health Insurance		Form 1095-A
	Childcare Tax Credit		Provider's Name, Address, Tax ID # & Amount Paid