

# Year-End Income Tax Document Checklist

|                   | Description                               | ✓ | Required Documents  |
|-------------------|---|---|---|
| <b>General</b>    | 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                |
| <b>Income</b>     | 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)                      |
| <b>Deductions</b> | 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  |
| <b>Other</b>      | 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                                    |