

# 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