
ITEMS NEEDED FOR TAX RETURN

✓ Tax Return Checklist for Individuals

Personal Information:

- Social Security numbers (including spouse and dependents)
- Valid photo ID (driver's license, state ID)
- Bank account info for direct deposit (routing & account number)

Income Documents:

- W-2 forms from all employers
- 1099s (e.g., 1099-NEC, 1099-MISC, 1099-INT, 1099-DIV, 1099-G, 1099-R)
- SSA-1099 (Social Security benefits)
- Unemployment compensation statements
- K-1s from partnerships, S-corps, or trusts
- Rental income and expenses
- Alimony received (if applicable)
- Other income (gambling winnings, jury duty, prizes, etc.)

Deductions & Credits:

Standard Deduction:

- Medical and dental expenses
- Childcare provider info (name, address, tax ID)
- Education expenses (Form 1098-T, tuition statements)
- Student loan interest (Form 1098-E)
- IRA contributions
- HSA contributions (Form 5498-SA)
- Health insurance info (Form 1095-A if from marketplace)
- Mileage logs or vehicle expenses (if claiming work-related travel)

Itemized Deduction:

- 1098 mortgage interest statement
- Property tax bills
- Charitable contribution receipts

✓ Tax Return Checklist for Businesses (Sole Proprietors, LLCs, S-Corps, C-Corps)

Basic Information:

- Business name, EIN, and address
- Prior year tax return (if new client)
- Accounting method used (cash or accrual)

Income:

- Gross receipts or sales
- 1099-NEC or 1099-K forms received
- Other income (rental, interest, grants, etc.)

Expenses:

- Advertising and marketing
- Vehicle expenses and mileage logs
- Office rent or home office info (sq. footage)
- Utilities, phone, internet
- Supplies and materials
- Payroll reports and W-2s issued
- Contractor payments (and 1099s issued)
- Insurance (liability, health, workers comp)
- Travel, meals, and entertainment
- Bank and credit card fees
- Software subscriptions
- Professional fees (legal, accounting, consulting)

Assets and Liabilities:

- New equipment or asset purchases (with date and cost)
- Loan and interest statements
- Depreciation schedules (if available)

Other:

- Business bank and credit card statements
 - Bookkeeping records or access to accounting software (QuickBooks, Xero, etc.)
 - Any IRS correspondence received
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