RESOURCES

Tax Appointment Checklist

Gather what applies to you before your appointment. Not sure about something? Bring it — Chris will sort it out.

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About you

- [ ] Photo ID for you (and your spouse, if filing jointly)
- [ ] Social Security numbers (or ITINs) and dates of birth for everyone on the return
- [ ] Last year's federal and state tax returns
- [ ] Bank routing and account number for direct deposit
- [ ] Your IRS Identity Protection PIN, if you have one
- [ ] Any letters you've received from the IRS or the state

Income

- [ ] W-2s from every employer
- [ ] 1099-NEC, 1099-MISC and 1099-K forms for freelance, contract or platform income
- [ ] 1099-INT, 1099-DIV and 1099-B forms from banks and brokerages
- [ ] 1099-R for retirement distributions and SSA-1099 for Social Security
- [ ] 1099-G for unemployment or a state tax refund
- [ ] Schedule K-1s from partnerships, S corporations, estates or trusts
- [ ] Records of self-employment income and expenses
- [ ] Rental property income and expenses
- [ ] Records of cryptocurrency sales or exchanges
- [ ] W-2G for gambling winnings

Deductions & credits

- [ ] Form 1098 for mortgage interest, and property tax bills
- [ ] Receipts for charitable donations
- [ ] Medical and dental expenses
- [ ] Child-care costs, with the provider's name, address and tax ID
- [ ] Form 1098-T for tuition and 1098-E for student-loan interest
- [ ] IRA and HSA contribution records (Forms 5498 and 5498-SA)
- [ ] Form 1095-A if you had Marketplace health insurance
- [ ] Receipts for energy-efficient home improvements
- [ ] Dates and amounts of any estimated tax payments you made

Life changes this year

- [ ] Marriage, divorce, or a new child or dependent
- [ ] Buying or selling a home (bring the closing statement)
- [ ] An inheritance
- [ ] Starting, buying or closing a business
- [ ] Moving to or from another state