



## Client Checklist

### **Personal Data**

- ☐ IF NEW: Previous Year's Tax Return
- ☐ IF NEW: Social Security Cards for entire family
- ☐ Valid (unexpired) Picture ID/DL (Spouse as well)
- ☐ Voided Check (or bank info) for Direct Deposit
- ☐ Proof of medical insurance: Form 1095-A,B,C
- ☐ IRS Identity Protection Pin (if applicable)

### **Income**

- ☐ W-2 Forms
- ☐ All 1099s including:
  - ☐ 1099-NEC: Independent Contractor
  - ☐ 1099-MISC: Miscellaneous Income
  - ☐ 1099-G: State Refund / Unemployment
  - ☐ 1099-DIV: Dividend Income
  - ☐ 1099-R: Retirement Income
  - ☐ 1099-C: Cancellation of Debt
  - ☐ 1099-B: Sale of Stock
  - ☐ 1099-S: Sale of Home + Final Closing Stmt
  - ☐ 1099-INT: Interest Income
  - ☐ SSA-1099: Social Security
- ☐ Alimony Received
- ☐ K-1: Income from Partnerships, Trusts, etc.
- ☐ Jury Duty / Legal awards / Settlements
- ☐ Gambling/lottery winnings/losses, prize money
- ☐ Scholarships & fellowships
- ☐ Self-Employment / Hobby Income
- ☐ Rental Income (long term / Airbnb)

### **Deductions/Credits**

- ☐ Mortgage Interest: Form 1098
- ☐ Mortgage Insurance Premiums: Form 1098
- ☐ Points / Loan Origination Fees: Form 1098 or final closing statement
- ☐ Second mortgage / RV interest paid

### **Deductions/Credits Con't**

- ☐ Real estate taxes paid (all property)
- ☐ Teacher Classroom Expenses / Supplies
- ☐ Closing Statement if new property OR refinanced
- ☐ State/local income tax (estimated tax payments)
- ☐ IRA, Keogh, retirement contributions
- ☐ Health Savings Account Contributions (HSA)
- ☐ Alimony Paid
- ☐ Medical, dental, long term care expenses
- ☐ Medical insurance premiums (if paid after tax)
- ☐ Casualty or theft losses
- ☐ Vehicle License Fees / DMV Registration
- ☐ Charitable contributions (money/goods)
- ☐ Education expenses: 1098-T or 1098-E
- ☐ Adoption Costs
- ☐ Child Care Expenses other than babysitting
- ☐ Electric Vehicle Credit
- ☐ Solar or other residential energy generator

### **If You Have a Business (Self-Employment)**

- ☐ All business income / expenses itemized on separate sheet (expenses categorized)
- ☐ Mileage log
- ☐ Equipment purchased / sold
- ☐ 1099 Forms
- ☐ Home office square footage

### **If You Have Rental Property**

- ☐ Addresses of all properties
- ☐ List # of days rented
- ☐ List # of days of personal use
- ☐ Rental income / expenses itemized on separate sheet (expenses categorized)
- ☐ Improvements made