

# Tax Document Checklist

## Required Documents

- Completed Intake Form (13614-C)
- Social Security cards or Individual Taxpayer Identification Number (ITIN)
- Cards/letters required for each person on the tax return
- State I.D., driver's license or passport for taxpayer and spouse
- Proof of health insurance (1095-A)
- If filing jointly, spouse must be present to sign paperwork
- Copy of last year's return
- Bank account number and routing number for direct deposit

## Income Items

- Wages (Form W-2)
- Social Security benefits statement (Form SSA-1099)
- Interest from checking and savings accounts (Form 1099-INT or bank statement)
- Dividend transactions (Form 1099-DIV)
- Unemployment compensation (Form 1099-G)
- Retirement account transactions (Form 1099-R, Form SSA-1099, Form RRB 1099)
- Gambling winnings (Form W2-G)
- Stock transactions with basis reported (Form 1099-B)
- Self-employment income
  - 1099-K for self-employment payments paid to you by credit card or electronic apps
  - 1099-Misc or gross receipts from self-employment
- Vehicle information: year vehicle was placed in service, total business miles, total commuting miles, and total personal miles

## Stimulus Payment and Advanced Child Tax Credit

- Notice 1444-C or Letter 6475
- Advanced Child Tax Credit Payment IRS Letter 6419

## Adjustments/Deductions

- Student loan interest payments (1098-E)
- Educator expenses for K-12 (receipts)
- Charitable contributions
- Mortgage interest statement (Form 1098)
- Final bill from 2020 real estate taxes paid in 2021
- Business expenses (if you are a sole proprietor or self-employed)

## Child Care Expenses

- Child care expenses (provider's name, address and SSN or Employer Tax ID)

## Higher Education Expenses

Student tuition and book expenses (1098-T, account statement, receipts for books and supplies); total in the following categories:

Expense	Amount
1. Tuition	_____
2. Fees	_____ (Academic fees only)
3. Books	_____ (Include only course-required books)
4. Supplies	_____ (Include only course-required supplies)
5. Room and board	_____ (Not a qualified expense)