



The quality of your tax return and the timeliness of its preparation strongly depends on making sure you provide **all** necessary documents and information.

We have created the following checklist of tax documents that will help ensure you are not missing any important tax documentation.

*** Please note that not all these forms may be applicable to your tax situation ***

This list simply serves as a guide to help you in the right direction.

- License, State ID or Passport **(REQUIRED)**
- Copy of your Social Security Card **(REQUIRED)**
- Dependent(s) Social Security Card(s) **(REQUIRED)**
- Direct Deposit Slip OR Bank Statement for Bank Routing and Account Number
- (W-2)** - from your employer(s)
- (W-2G)** - from gambling winnings
- (1099-INT)** - Bank interest income
- (1099-MISC)** - from other income sources (i.e self employment)
- (1099-NEC)** - Non-employee Compensation
- (1099-G)** – Unemployment Compensation
- (1098)** - Home Mortgage Statement from your Bank or Lender
- (1098-E)** - Tuition Statement
- (SSA-1099)** - Social Security Administration
- (1095-A)** - Health Insurance Marketplace Statement
- (1095-B)** - Health Coverage
- (1095-C)** - Employer-Provided Health Insurance Offer and Coverage

** If you are self-employed (small business owner and/or received a 1099 you can get your tax liability reduced especially if you did not pay any taxes during the tax year **

Please see checklist below for an idea of the information you will need to gather for your tax preparer.

- Advertising
- Office Rent
- Supplies
- Taxes & Licenses
- Travel Expenses (flights, hotels)
- Meals
- Uniforms
- Utilities (internet, phone bill, electricity for office, zoom, etc)

Auto Expenses/Information *(only applies if you had to use your vehicle for work)*

- Make, model and year of vehicle
- Mileage at beginning of year
- Mileage when you began using the vehicle for business purposes if it was not at the beginning of the year
- Mileage at the end of the year
- Car Insurance
- Repairs & Maintenance (windshield wipers, oil changes, new battery, catalytic converter, etc)
- Tires
- Gas
- Parking fees
- Rental cars
- Tolls