

# TAX PREPARATION CHECKLIST

Documents to send for tax prep

## BASIC INFORMATION

- ☐ Government ID (SSN / TIN / ITIN)
- ☐ Prior year tax return
- ☐ Bank account details
- ☐ Filing status
- ☐ Dependents' detail

## INCOME DOCUMENTS

- ☐ W-2
- ☐ 1099-NEC / 1099-MISC
- ☐ 1099-INT, 1099-DIV, 1099-B
- ☐ 1099-R, SSA-1099
- ☐ Rental, K-1, unemployment income

## HEALTH INSURANCE

- ☐ 1095-A (if Marketplace insurance)
- ☐ 1095-B / 1095-C (optional support)

## DEDUCTIONS & CREDITS

- ☐ Mortgage interest (1098)
- ☐ Student loan interest (1098-E)
- ☐ Education (1098-T)
- ☐ Charity receipts
- ☐ Childcare expenses

## BUSINESS / SELF-EMPLOYED

- ☐ Profit & Loss statement
- ☐ Expense records
- ☐ Invoices / receipts
- ☐ Asset purchases

## DEDUCTIONS & CREDITS

- ☐ Crypto transactions
- ☐ Foreign income
- ☐ Stock options / RSUs
- ☐ Loss carryforwards

## REAL ESTATE

- ☐ Rental income & expenses
- ☐ Closing statements for property purchase

The logo for Empower Bookkeeping Firm, featuring the word "Empower" in a large, blue, cursive script font.

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