

Tax Documents Checklist

New Clients – Please Bring

- Government-issued photo ID
- Social Security cards or ITIN letters
- Birth dates for all individuals
- Last 1–2 years of tax returns
- Proof of address (if applicable)
- W-2 and all 1099 forms
- Other income (rent, gambling, cash)
- Employer documents for tips and overtime (verify accuracy)
- Childcare expenses and provider information
- Education forms (1098-T, 1098-E)
- Medical expenses, mortgage interest, property taxes, donations
- If self-employed: income, expenses, and business documents
- If purchased a vehicle: bill of sale and interest paid summary

Returning Clients – Please Bring

- Updated personal information
- All W-2s and 1099s
- Employer documents for tips and overtime (verify accuracy)
- Updated deductions and expenses
- If self-employed: updated income, expenses, receipts
- If purchased a vehicle: bill of sale and interest paid summary