



# Tax Preparation Checklist

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## Personal information

- Picture IDs (Not Expired)
- Social Security **CARDS** or ITIN letters for all new filers or dependents
- Bank Routing /Account numbers if you want direct deposit (a voided check will do)
- Prior tax returns for new clients
- Two separate documents (school, insurance, doctor, etc.) for each child that lived with you (must show the child's name, address, and a date during 2022)

## Income Documents

- All** W2's (even if you worked for only a short time). WE CANNOT PREPARE USING PAYSTUBS
- 1099 forms for self-employment (NEC), interest (INT), dividends (DIV), stock sales (B), and retirement distributions (R), Social Security (SSA), or Unemployment (G), Cancellation of Debt(C)
- Crypto Currency income (1099-B or Form 8949)
- Gambling income & Lottery winnings (W2-G). Also provide Win/Loss Statements
- Schedule C Business income and related expenses
- Schedule E Rental Income and related expenses
- K-1s from Partnership, trust, or S-Corporation interests

## Other Tax Documents

- HSA documents (1099-SA and 5498-SA)
- Marketplace health insurance (1095-A)
- Student Loan interest (1098-E)
- IRA contributions
- Mortgage Interest (Form 1098)
- Real Estate taxes (2021 paid in 2022)
- College Tuition (Form 1098-T), and amounts paid for related books and supplies
- Charitable Contributions (Cash/Check, and Non-Cash)

**Anything else you are not sure of...Bring it just in case and ask us!**