Standard Tax Return Checklist

Please provide the following documentation to us for preparing your individual income tax return.

PERSONAL:

- ☐ Client Contact Information Form
- ☐ Copy of Current State-Issued Drivers License (If Not Already on File)
- ☐ Name(s), Social Security Number(s) and Date(s) of Birth for Dependents
- ☐ Identity Protection PIN (IP PIN) Number (If Required)
- ☐ Copy of Previous Year's Federal and State Tax Returns (New Clients Only)
- ☐ Voided Check for Direct Deposit or Withdrawal

INCOME:

- ☐ W-2s and/or 1099s
- ☐ Interest Statements (1099s)
- ☐ Dividends and Stock Transaction Statements

EXPENSES:

- ☐ 1098-T Tuition Statement
- ☐ 1098-E Student Loan Interest

DEDUCTIONS:

- ☐ Mortgage Interest Statement
- ☐ Closing Statements (Home or Property Transactions)
- ☐ Cash and/or Charitable Donation Receipts
- ☐ Child Care Expenses
  - ☐ Amount
  - ☐ Facility Name and Address
  - ☐ Employer Identification Number

Please add any notes, comments or questions pertaining to your return:

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