

## Tax Preparation Document Checklist

If your tax return is still in progress, it is often because one or two documents have not arrived yet. Use this checklist to see what might still be needed.



### Personal Information

- Photo ID
- Social Security numbers for all dependents
- Direct deposit information for refunds



### Income Documents

- W-2 forms from employers
- 1099-NEC or 1099-MISC (contract work)
- 1099-INT or 1099-DIV (bank or investment income)
- 1099-B or brokerage statements
- Social Security income statements



### Health Insurance

- Form 1095-A (Health Insurance Marketplace coverage)



### Deductions & Credits

- Charitable contribution records
- Mortgage interest statement (Form 1098)
- Property tax information
- Childcare expense records
- Education documents (Form 1098-T)



### Other Important Documents

- Prior year tax return
- Retirement contribution records
- IRS or State tax notices

Still waiting on a document?

Drop it off or upload in the secure portal when it arrives so we can keep your return moving forward. **\*\*Please do not send via text or email\*\***