

Tax Return Documents (The most common ones!)

Personal & Sole-Proprietorship/One-Member LLC

(This list is not exhaustive! If you have any other tax documents, please send them as well or email with questions.)

Income

(Cheat Code: anything with W-2 or 1099 on it, plus any income not documented elsewhere)

- **Employment/Self-Employment**
 - **Forms W2** from “traditional” jobs (all pages)
 - **Forms 1099-NEC** from non-employment compensation (contractors, gig jobs)
 - **1099-MISC** for royalties, real estate income, or miscellaneous income (e.g. grants)
 - **1099-K** from third-party transactions such as Shopify, Paypal, Etsy, Square, etc.
 - **Records of Any Other Taxpayer or Household Income** (spreadsheet or list)
 - If you need help organizing your various incomes, the [Self-Employment Income Tracker](#) is always free to use for your own organizing purposes.
 - *You must either go to File → Make A Copy or download it as a .xls file before you can edit it for yourself.*
- **Retirement Income and Distributions**
 - **Forms 1099-R** for Retirement Income and Distributions (Including Rollovers)
- **Social Security Income and Benefits**
 - **Forms SSA-1099 or SSA-1042S** for Social Security Benefits Received
- **Unemployment Income and Government Payments**
 - **Forms 1099-G** for Unemployment or Federal, State, or Local Government Payments
- **Banking/Investment Income** (all pages)
 - **Forms 1099-B** from Stocks, Bonds, Mutual Funds
 - **Forms 1099-DA** from Cryptocurrency
 - **Forms 1099-DIV or 1099-INT** from Dividends or Interest Earned Forms
- **Gambling Winnings**
 - **Forms W2-G** from Gambling Winnings Forms
- **Home Sales Income** (if you sold a home in the tax year in question)
 - **Forms 1099-S**
 - **Closing Documents**
- **HSA or MSA Funds Spent/Distributed**
 - **Forms 1099-SA**
- **Distributions from Partnerships, Trusts, etc.**
 - **Schedules K-1** (all pages)
 - **Form 1041**

Identification

- **Social Security Number or ITIN** (and spouse's if applicable - filing jointly or separately)
 - This may be on your prior tax returns. If not, please submit your SSN/ITIN separately.
- **Unexpired Photo ID** (including spouse's if filing jointly)
 - Drivers License, State ID, Passport
- **IP PIN** (if assigned one by the IRS - including spouse's if filing jointly)
- **Copies of Previous Tax Returns** (if new client)
 - 3 Years if Possible - at least most recent tax return (federal and all states)
- **Direct Deposit Information** ([Direct Deposit Form](#))
 - Bank Routing and Account Number for Direct Deposit/Withdraw Purposes
- **Dependents (if claiming):**
 - **Dependents' Social Security Numbers or ITINs**
 - **IP PIN** (if Assigned one by the IRS) for any dependents
 - **Form 8332** for Dependents of Which you are NOT the Custodial Parent

Deductions

- **Self-Employment Expenses, Personal Vehicle Mileage, and Home Office Info**
 - *These are UNRELATED to and in addition to the standard deduction, so please track and submit them!*
 - [Expense Organizer](#) with the totals for your expense categories
 - If you need help organizing your expenses, the [Self-Employment Income Tracker](#) is always free to use for your own organization.
 - *You must either File → Make A Copy or download it as a .xls before you can edit it for yourself. For gathering expenses, the following tabs are useful: Expenses, Car Expenses including mileage, and Home Office.*
- **Marketplace Health Insurance (if applicable)**
 - **Form 1095-A** (If you've lost the one you received in the mail, you can find this in your portal at healthcare.gov.)
- **Educational Expenses**
 - **Form 1098-T** (Tuition, Fees, and Expenses Paid to Eligible Postsecondary Institutions)
- **Home Ownership**
 - **Form 1098** for Mortgage Interest, Points Paid
 - **Property Tax Records** (or amounts paid)
- **Medical Expenses**
 - **List of medical expenses** (Only Deducted if you Itemize and If More than 7.5% of your Adjusted Gross Income)
- **Childcare Expenses**
 - **For each childcare provider:**
 - **Provider's EIN or SSN**
 - **Provider's Address**
 - **Total Paid to Provider**
- **Home/Vehicle Ownership (Purchase of Home or Home Improvements)**
 - **Purchase/Refinance of Home**
 - **HUD-1 Settlement Statement** (if applicable)
 - **Closing Documents** if you Purchased or Refinanced a Home
 - **Eco-Friendly Home/Vehicle Upgrades and Purchase**
 - **Receipts For Eco-Friendly Energy-Efficient Home Upgrades OR Electric Vehicle Purchases**
 - **Vehicle Sales Tax Paid** if you Purchased or Leased a Vehicle
- **Charitable Donations**
 - **Receipts of Charity Donations** (Only deducted if you itemize on 1040-A instead of taking standard deduction)
- **Student Loan Interest**
 - **Form 1098-E**
- **Teacher Expenses**
 - **Total expenses for classroom purchases** (if you are an Eligible Educator, deduction of up to \$300 per Taxpayer)

- **HSA/MSA Contributions**
 - **Form 5498-SA**
- **Moving Expenses (for Active Duty Military Members Only)**
 - **Total moving expenses**

Payments Already Made

- **Estimated Taxes Paid** (if applicable)
 - **List with date and amount for each payment** (IRS and/or any applicable states)