FREE CHECKLIST

Tax return document checklist

Before your tax appointment, gather every income form (W-2s, 1099s and K-1s), your business profit and loss, records for deductions like mileage and your home office, proof of estimated payments, and last year's return. This checklist covers it all, so your return isn't held up waiting on one missing form.

Fillable PDF. Click a box to tick it and type in the notes, then save or print.

Personal details 4 ITEMS

- [ ] Last year's federal and state returns
- [ ] Social Security numbers and birth dates for you, your spouse and dependents
- [ ] Bank routing and account number for your refund or payment
- [ ] Any IRS or state letters you received this year

Income 7 ITEMS

- [ ] W-2s from every job
- [ ] 1099-NEC and 1099-MISC forms from clients
- [ ] 1099-K forms from payment apps and marketplaces
- [ ] Schedule K-1s from partnerships, S-Corps and trusts
- [ ] 1099-INT, 1099-DIV and 1099-B from banks and brokers
- [ ] Rental income and expense records
- [ ] Social Security (SSA-1099) and retirement (1099-R) statements

General information, not tax advice for your situation.

Business records 7 ITEMS

- [ ] Profit and loss statement for the year
- [ ] Balance sheet, if you have an LLC or corporation
- [ ] Bank and credit card statements, reconciled
- [ ] Mileage log with dates, places and purpose
- [ ] Home office square footage and household costs
- [ ] Receipts for equipment, vehicles and large purchases
- [ ] Payroll reports and W-3, if you have employees

Deductions and credits 6 ITEMS

- [ ] Health insurance premiums (Form 1095 statements)
- [ ] Retirement contributions (IRA, SEP, solo 401(k))
- [ ] Childcare costs and the provider's tax ID
- [ ] Charitable gift receipts
- [ ] Mortgage interest (Form 1098) and property tax bills
- [ ] Student loan interest and tuition forms (1098-E, 1098-T)

Payments already made 3 ITEMS

- [ ] Federal estimated tax payments with dates
- [ ] State estimated tax payments with dates
- [ ] Last year's refund applied to this year, if any

Notes

Want your return done?
One fixed price, agreed before we start. Book a free 30-minute call at eminenttax.com/contact or call (972) 347-4590.

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