Client Checklist

Check everything that applies.

1. ID’s and Social security cards of everyone claiming on tax return.
2. All income statements:

W-2 Wages \_\_\_

W-2G Gambling \_\_\_\_

1099G unemployment \_\_\_

1099SSA Social Security \_\_\_\_

1099R Retirement/Pension \_\_\_\_\_

1099-INT Interest Income \_\_\_\_\_

1099-DIV Dividend Income \_\_\_\_\_

1099NEC Self Employment \_\_\_\_\_

HSA Statement \_\_\_\_

Capital Gain Statement \_\_\_\_\_\_

Stocks/Bonds \_\_\_\_

1099C Cancellation of Debt \_\_\_\_

Other Income \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_

1. Itemized Deductions:

Mortgage Interest \_\_\_\_

Property Taxes \_\_\_\_

Car Taxes \_\_\_\_

Total of medical/ Dental/ Prescription/ office visits \_\_\_\_

Charitable giving statement \_\_\_

1. Child Care expense statement (Must have childcare providers name, address, phone number and EIN or social Security Number) \_\_\_\_
2. 1098T Tuition/ Education Expense \_\_\_\_
3. 1098-E Student Loan Interest \_\_\_\_
4. First-Time Homebuyers Repayment \_\_\_\_\_\_ How much $ \_\_\_\_\_\_
5. 1095-A Marketplace Health Insurance \_\_\_\_\_\_
6. Direct Deposit information \_\_\_\_\_