



Tax Checklist

Personal Information

- Driver's License or State Identification
- Social Security Card for all tax filers and dependents (not just the number)
- Date of Birth for all tax filers and dependents
- Filing Status (ask your tax preparer if you are unsure)
- Mailing Address

Income

- W2s
- 1099s (Self-Employment or Contractor)
- 1099-R (Retirement and Pensions)
- 1099-G (Unemployment Compensation, Past State tax refunds)
- Gross Cash earnings
- Merchant Services Payouts (PayPal, Square, QuickBooks, etc)

Deductions

- Self Employed or applicable LLC Expenses
- Charitable Cash Donations (Tithes and Offering to Church, etc)
- Non-Cash Donations (Goodwill, Thrift Stores, etc.)
- Daycare Expenses

Credits

- College Education (Tuition, Books, Housing, etc)
- Retirement Contributions

Payments

- Additional payments to IRS or State Agencies
- Quarterly payments on Self Employed business or LLC