

When preparing for a tax appointment with your accountant or tax preparer, it's essential to bring all the necessary documents and information to ensure a smooth and efficient process. Here's a comprehensive checklist of what to bring:

1. Personal Information

- **Identification:** Driver's license, passport, or other government-issued ID.
- **Social Security Numbers (SSN):** For yourself, your spouse, and any dependents.
- **Bank Account Information:** Routing and account numbers for direct deposit or payment of taxes.
- **If you do not have all your documents please have all your log-in information ready.**

2. Previous Year's Tax Return

- **Copy of Last Year's Tax Return:** This helps your tax preparer understand your tax situation and carry over any relevant information.

3. Income Documents

Make sure to gather all income-related documents, including:

- **W-2 Forms:** For wages, salaries, and tips (provided by employers).
- **1099 Forms:**
 - **1099-NEC:** For independent contractor or freelance work.
 - **1099-MISC:** For other miscellaneous income.
 - **1099-K:** For income received through third-party payment processors (like PayPal or Square).
 - **1099-INT:** For interest income (from banks or other financial institutions).
 - **1099-DIV:** For dividends and distributions.
 - **1099-B:** For sale of stocks, bonds, or other investments.
 - **1099-R:** For retirement plan distributions or IRA withdrawals.
 - **1099-G:** For unemployment benefits or state tax refunds.
 - **1099-S:** For real estate sales.
- **Schedule K-1:** For income from partnerships, S-Corps, estates, or trusts.
- **Rental Income Records:** If you have rental properties (e.g., lease agreements, rent receipts).

4. Self-Employment or Business Income

- **Profit and Loss Statement:** Showing your income and expenses for the year.
- **1099-NEC Forms:** For payments received as a contractor.
- **Mileage Log:** If you use your vehicle for business purposes.
- **Business Expenses:** Receipts, invoices, and records of deductible expenses (advertising, supplies, travel, etc.).
- **Estimated Tax Payments:** Proof of quarterly payments made (if any).

5. Investment Information

- **Brokerage Statements:** For investment accounts, showing trades, dividends, and interest.
- **Cost Basis Information:** For any stocks, bonds, or other investments sold.
- **Cryptocurrency Transactions:** Records of buying, selling, or trading digital assets.

6. Real Estate and Property Information

- **Form 1098:** Mortgage interest statement from your lender.
- **Property Tax Statements:** Proof of property taxes paid.
- **Closing Statements:** If you bought or sold a home (HUD-1 or ALTA statement).
- **Rental Property Expenses:** Receipts for repairs, maintenance, insurance, etc.

7. Deductible Expenses and Tax Credits

- **Medical and Dental Expenses:** Receipts for out-of-pocket expenses not covered by insurance.
- **Charitable Contributions:** Receipts or acknowledgement letters from charities.
- **Childcare Expenses:** Receipts and provider's tax ID number for the Child and Dependent Care Credit.
- **Education Expenses:** Form 1098-T (tuition), Form 1098-E (student loan interest), and receipts for qualified expenses.
- **Retirement Contributions:** Statements for IRA, 401(k), SEP, or other retirement accounts.
- **Energy-Efficient Home Improvements:** Receipts for solar panels, energy-efficient windows, etc.

8. Home Office Deduction (if applicable)

- **Square Footage:** Measurements of your home and your dedicated office space.

- **Home Expenses:** Utility bills, rent, mortgage interest, and home maintenance receipts.

9. Health Insurance Information

- **Form 1095-A:** If you purchased insurance through the Health Insurance Marketplace.
- **Form 1095-B/1095-C:** For health coverage provided by an employer or other insurance providers.

10. Miscellaneous Documents

- **Alimony Payments:** Proof of payments and recipient's SSN (for divorces finalized before 2019).
- **Legal Name Changes:** If there have been any changes due to marriage, divorce, etc.
- **Foreign Bank Account Information:** For compliance with FATCA and FBAR (if applicable).
- **IRS Notices:** Any letters or notices received from the IRS.

11. Estimated Tax Payments

- **Proof of Quarterly Payments:** Receipts or records of estimated tax payments made throughout the year.
- **Prior Year Refund Applied:** Documentation if you applied last year's tax refund to this year's estimated taxes.

Tips for a Smooth Tax Appointment

- **Organize Documents:** Use folders, envelopes, or digital files to separate categories (e.g., income, deductions, investments).
- **Bring a List of Questions:** If you have any uncertainties or potential tax-saving strategies to discuss.
- **Digital Copies:** If possible, scan documents to a USB drive or cloud storage for easy sharing.
- **Spreadsheet of Expenses:** Consider preparing a summary of your expenses, especially if you're self-employed.