



Document Checklist

- Last year's tax return (If new client)
- W-2 (Wages)
- 1099-Int, 1099-Div, 1099-B –Investment income statements
- 1099-R (Retirement distributions)
- SSA-1099 (Social security income)
- 1099-G (Unemployment income and state tax refunds)
- Schedule K-1 from Partnership, S Corporation, or Trust
- Self-employment income (include all 1099-Misc) and expenses
- Rental income and expenses
- Form(s) 1095-A (Marketplace health insurance)
- Form 1098-E (Student loan interest paid)
- Form 1098-T (Tuition paid for post-secondary education)
- Medical expenses
- Form 1098 (Mortgage interest)
- Property tax statements
- Charitable donations (cash and non-cash)
- 5498-SA / 1099-SA (HSA contributions/distributions)
- Any notices received from IRS in the past year