

**TAX PREPARATION CHECKLIST**

*Use this checklist as a guide as you gather the **most common** tax documents needed to complete your tax return. **This list is not all-inclusive. You must ensure all tax documents are included based on your individual circumstances.** A tax return prepared with missing or invalid information may take longer for me to process and/or result in a tax return that needs to be amended, which comes with an additional fee.*

**Personal information**

- Photo ID of you and your spouse. *(Copies are fine)*
- Social Security Numbers and dates of birth for you, your spouse, and all dependents claimed on the tax return.
- Bank account and routing number. *(Direct Deposit option)*

**Information about your income**

- 2021 Summer and winter property taxes. *(Not the assessment, the actual tax bill.)*
- All W2, 1098, 1099-C, 1099-G, 1099-MISC, 1099-R, 1099-S, 1099-INT, 1099-DIV, 1099-B, 1098, SSA-1099.

**Adjustments to your income**

- List of charitable contributions with total for 2022.
- Amount of medical expenses paid for 2022.
- 1098-T for tuition paid for all college aged dependents you are claiming. *(You can get this from their college or University to see if you qualify for an Education Credit.)*
- Daycare expenses paid for any/all children. *(See Dependent Care Credit for details)*
- 1095-A for those who had Marketplace Health Insurance.

**If you are mailing in or dropping off your taxes, include this form and complete the below information and include it with your information.**

Name: \_\_\_\_\_ Phone number: \_\_\_\_\_

Address: \_\_\_\_\_

- Mail my tax return to me via USPS certified mail.       I will pick up my return.

*\*If you do not select an option, your tax return will be sent to you via USPS Certified mail and a fee will be added.*