

Individual & Business/Rental Properties Tax Appointment

– Preparation Checklist

Please upload or bring any items that apply to your situation.

Dependents

- Annual proof of child residency
(examples: daycare bill, doctor bill, report card)
- Childcare expense records

Income

- W-2(s)
- Final paystub(s) of the year 2025
- 1099-NEC / 1099-MISC *(side work, gig income)*
- 1099-INT / 1099-DIV *(interest & dividends)*
- 1099-G *(unemployment, state refunds)*
- 1099-R *(retirement distributions)*
- SSA-1099 *(Social Security benefits)*
- Any other income received

Loans & Interest

- Auto loan interest
- Student loan interest

Itemized Deductions (if applicable)

- Mortgage interest (Form 1098)
- Property tax statements
- Charitable donation receipts & totals
- Medical expense records & totals



Investments & Other Financial Activity (if applicable)

- Brokerage statements
- Cryptocurrency transaction summaries
- Schedule K-1(s)



Adjustments

- IRA contribution records
- HSA contribution records



Credits

- Education expenses (Form 1098-T)
- Energy-efficient home improvements or vehicle purchases



Health Insurance

- Marketplace Health Insurance form (1095-A)



Business & Rental Properties

- Profit & Loss or Expense/Income reports
- Current Asset List with changes
- Mileage logs/reports
- Rental properties
 - Profit & Loss/ Expenses/Income reports for **each** property



Other

- Any additional documents you believe may be relevant

If you are unsure whether something applies to you, feel free to send us a message through the portal.