

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.