

# Individual 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)

### **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.

### **Important Notice**

If you **own a business, receive self-employment income, or have rental properties**, please **contact** our office **as soon as possible**.