

## Tax Documents Checklist

- Valid ID for Taxpayer and Spouse (if applicable)
- Bank Account and Routing Number (For Direct Deposit or Withdrawal)
- Form 1095-A Health Insurance Statements (if you had health insurance thru the Marketplace)

### All Sources of Income Received

- W2s
- W2G (Gambling) \_\_\_\_\_ Casino Losses reported
- 1099NEC, 1099 MISC, 1099C (Other income, Rental Income, Cancellation of Debt)
- 1099B, 1099R, 1099SSA (Investments, Retirement, Social Security)
- Foreign account statements (if you hold any foreign assets, including bank accounts and securities)
- 1099G (Unemployment)
- 1099K (Merchant account)
- K-1 (Income from S Corporation or Partnership)
- Expenses Totaled for Self-Employment Income, Rental Income, Income from gig economy activity (Airbnb, Uber, etc)

### If you Own or Sold Real Estate Property

- Mortgage Interest (Form 1098)
- Real Estate Tax Statement
- Escrow closing statement and Form 593 (Estate Withholding Tax Statement)

### For credits and income deductions

- IRA Contributions
- Alimony paid.
- Student loan interest deduction (Form 1098E)
- Education credits (Form 1098T is required to take the credit)
- Total of Medical expenses paid (Premiums, doctors and prescriptions)
- Charitable Contributions made (receipts from Non-Profit Organizations if gift is more than \$250)

### If you have children

- Birth Certificate (If not on file or Newborn)
- Social Security cards (if not on file or Newborn)
- School or Medical record that shows: Name of the child, Name of the parent, Address where child lives.
- Childcare Statement that includes Name of provider, address, EIN, phone number, amount paid)

### For New Clients

- All documents described above.
- Copy of your Income Tax Return for the previous 2 years.

**WORK CANNOT COMMENCE UNTIL WE HAVE ALL REQUIRED TAX DOCUMENTS**

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STS Employee

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Date