Tax Info Sheet

Your Financial Complexities Simplified

We'll need these tax documents and information to file.

Use this sheet as your master checklist before your appointment. The more complete your documents, the faster and more accurate your return will be.

Personal Information

- Social Security cards or ITIN letters (you, spouse, and all dependents)
- Government-issued photo ID
- Current mailing address and phone number
- Bank account and routing number for direct deposit / payment
- Prior-year tax return (new clients)

Income Documents

- W-2 (wages)
- 1099-NEC / 1099-MISC (contract or miscellaneous income)
- 1099-K (payment card / third-party network income)
- 1099-INT / 1099-DIV (interest and dividends)
- 1099-B (investment sales)
- 1099-R (retirement distributions)
- 1099-G (unemployment or state refund)
- SSA-1099 (Social Security benefits)
- K-1s (partnership, S-corp, trust or estate income)
- Rental income records

Deduction & Credit Documents

- 1098 (mortgage interest)
- 1098-E (student loan interest)
- 1098-T (tuition statement)
- Property tax statements
- Charitable donation receipts
- Childcare provider name, address, and Tax ID
- Medical expense records
- Retirement contribution records (IRA, HSA)
- Educator expense receipts

Self-Employment / Business Documents

- Profit & loss statement or income/expense summary
- Mileage log or vehicle expense records
- Home office square footage and utility costs
- Business asset purchases
- Estimated tax payments made

Other Important Items

- Health insurance forms (1095-A, 1095-B, or 1095-C)
- Any IRS or state tax notices received
- Marriage, divorce, or name change documentation
- Records of any major life changes (new home, new child, new job)

Not everything organized yet? No problem — bring what you have and we'll help you sort it out.

Questions about this worksheet? Contact AskHolmes at askholmes.info or (786) 550-5959.