Tax Preparation Checklist

Everything to gather before your appointment so nothing delays your return. Bring what applies; if you are unsure, bring it anyway.

Identification

- Photo ID for you and your spouse.
- Social Security cards or ITIN letters for everyone on the return.
- Dates of birth for all dependents.
- Prior-year tax return, if available.

Income Documents

- W-2 from each employer.
- 1099-NEC or 1099-K for self-employment and platform income.
- 1099-INT, 1099-DIV, 1099-B for interest, dividends, and sales.
- 1099-G for unemployment or state refunds.
- SSA-1099 for Social Security benefits.
- Records of cash or other income not reported on a form.

Deductions and Credits

- Form 1098 for mortgage interest and 1098-T for tuition.
- Childcare provider name, address, and EIN with amounts paid.
- Charitable contribution receipts.
- Medical expense totals.
- Educator or work-related expense records.

Self-Employed and Business

- Income summary by month.
- Expense summary by category.
- Mileage log with business purpose.
- Home office square footage and total home square footage.
- Records of estimated tax payments made.

Banking and Delivery

- Routing and account number for direct deposit.
- Any IRS or state notices received during the year.
- IP PIN letter if the IRS issued one.

Questions? Schedule a consultation at mwomackfinancial.com or call 1-844-693-7829.