



TAX PREPARATION CHECKLIST (OPTIONAL)

Taxpayer name _____

Contact # _____

Spouse name (if applicable) _____

Check all that apply. If submitting multiples of one form, indicate how many next to the corresponding checkbox.

- _____ ☐ **Individual Intake Form**
- _____ ☐ **W-2 Form** for salaried workers. Provide one for each employer you and your spouse worked for
- _____ ☐ **1099-NEC** for clients who paid individuals for services but not classified as employees
- _____ ☐ **Self-Employed Income and Expense Sheet** for freelance workers
- _____ ☐ **Rental Income and Expense Sheet**
- _____ ☐ **1099-G** if you received unemployment compensation
- _____ ☐ **1099-SA Social Security** for clients and spouses who are retired and receiving social security
- _____ ☐ **1099-R** for withdrawals from pension income, IRA, Roth IRA, annuity, or life insurance
- _____ ☐ **W-2G** for gambling winnings from casino or lottery
- _____ ☐ **1099-INT** if you received interest income from a savings account or checking account
- _____ ☐ **1099-DIV** if you received dividends
- _____ ☐ **1099-B** if you sold stocks, bonds, mutual funds or crypto currency (please provide cost basis)
- _____ ☐ **1099-S** if you sold personal residence or rental property
- _____ ☐ **5498** if you contributed to a retirement account
- _____ ☐ **1095-A** if you acquired healthcare through the marketplace
- _____ ☐ **1099-SA** and **5498-SA** if you have an H SA
- _____ ☐ **1098-E** for student loan interest
- _____ ☐ **1098-T** for tuition paid
- _____ ☐ **1098** for mortgage interest
- _____ ☐ **529** please specify which plan and how much per child in space below.
- _____ ☐ Childcare expenses? Provide details of childcare provider (name, address, tax ID and \$ amount per child) in space below.
- _____ ☐ Did you move one or more times in the last year? Please provide move dates in space below.

Use the space below to customize any other items for your return.
