TAX PREPARATION CHECKLIST

☐ If New Client, provide copies of last year's tax returns - federal and state

☐ **Must Provide Copy of Driver's License for Taxpayer and Spouse**

☐ All Forms:
W-2 - Wages
Social Security Benefit Statement
1099-G Unemployment Compensation
1099-INT - Interest
1099-DIV - Dividends
1099-B - Proceeds from broker or barter transactions
1099-R - Pensions and IRA Distributions
Schedule K-1 from:
    Partnerships
    S Corporations
    Estates and Trust
1099-MISC - Non-Employee Compensation/Rent Received
Any Other Income Reporting Statements

☐ Health Care Coverage (for each member of the household):
1095-A - Health insurance purchased from Marketplace

☐ Copy of closing statement if you bought, sold, or refinanced real estate

☐ Alimony Received or Paid and Date of Divorce or Modification

☐ Detail of Itemized Deductions:
Medical
Taxes
Mortgage Interest - Form 1098
Charitable Contributions

☐ Bank information if Direct Deposit Required

☐ Completed Summary Organizer and Questions

☐ **Signed Engagement Letter**