

Tax Document Submission Checklist

Please gather and submit the documents below that apply to your situation so we can accurately prepare your tax return.

Identification & Personal Information

- Photo ID (Driver's License, State ID, or Passport)
- Social Security Number or ITIN for you, your spouse, and dependents
- Prior year tax return (if available)

Income Documents

- W-2 forms (employment income)
- 1099 forms (1099-NEC, 1099-MISC, 1099-INT, 1099-DIV, etc.)
- Any additional income statements or records

Self-Employment or Business (If Applicable)

- Records of business or self-employment income
- Business expense records
- Business bank statements (if available)

Housing & Property

- Mortgage interest statement (Form 1098)
- Property tax records

Education Expenses

- Form 1098-T (tuition statement)
- Receipts for education or tuition expenses

Dependents & Childcare (If Applicable)

- Childcare expenses
- Childcare provider name, address, and Tax ID number

Medical & Charitable Deductions (If Applicable)

- Medical expense records if itemizing deductions

- Charitable donation receipts or documentation

Banking Information

- Bank routing number and account number for refund direct deposit or tax payment

Vehicle Information (If Applicable)

- Total business miles driven for the year
- Vehicle purchase or lease information
- Records of gas, repairs, maintenance, and insurance

Pro Tip: Please upload documents clearly and completely through the secure portal to avoid delays in preparing your return.