

Tax Return Document Checklist

Please find below a general list of tax documents that we will need to prepare your tax return.

Information:

- Estimated Tax Payment Dates and Amounts (please provide receipts if possible)
- If you have had an Identity Protection pin in the past, please retrieve your 2025 IP Pin from the IRS:
 - <https://www.irs.gov/identity-theft-fraud-scams/retrieve-your-ip-pin>
- If you are claiming new dependents this year, please provide their Full name and DOB. call the office at 281-962-0310 to provide their SSN

Income from all sources in 2024:

- **W-2** from all jobs held in 2024
- **W-2G** Gambling Winnings
- **1099-MISC** Rents, royalties, miscellaneous
- **1099-NEC** Non-employee compensation
- **Schedule K-1** or a list of K-1s you are waiting on and when to expect them
- **1099-B** Brokerage tax statements (please provide **all pages**).
- **1099-C** Cancellation of Debt
- **1099-DIV** Dividends
- **1099-INT** Interest
- **1099-K** Payment Card and Third Party Network Transactions

Retirement:

- **1099-SSA** Social Security Benefits
- **1099-R** Distribution information from retirement plans, pensions, etc.
- **5498** Contribution information for IRAs

Itemized Deductions:

- Medical Expenses
- Donations
 - Name of Organization
 - Cash amount
 - Description and Fair Market Value of items donated

- Real Estate Property Taxes (Including MUD)
- 1098 Mortgage Interest Statement
- HUD or ALTA Closing Statements for real estate transactions
- Major purchase Sales Tax Receipts / Statements

Healthcare:

- **1095-A** Health Insurance Marketplace Statement
- **5498-SA** Contribution information for HSA or Archer MSA
- **1099-SA** Distribution information for HSA / Archer MSA

Education:

- **1098-T** Tuition Statement
- **1098-E** Student Loan Interest
- **1099-Q** Payments from Qualified Education Programs

Childcare:

- Childcare Provider Statements for dependent care expense
- Must include Name and EIN of provider, date and amounts paid

Schedule C or E:

- Business and Rental or Royalty expenses (See our templates [here](#))
 - Excel spreadsheets of statements can be downloaded from your bank