

Client Document Checklist

Identity & Household

- ☐ Government-issued photo ID for taxpayer and spouse
- ☐ Social Security cards or ITIN letters
- ☐ IP PIN letters for everyone issued an IP PIN
- ☐ Dependent residency and relationship records when required

Income

- ☐ All W-2 forms
- ☐ All 1099 forms, including NEC, MISC, K, INT, DIV, B, R and G
- ☐ Self-employment income and expense records
- ☐ Rental income and expense records
- ☐ K-1 forms and other income statements

Credits & Deductions

- ☐ Form 1095-A
- ☐ Childcare provider name, address, EIN/SSN and amount paid
- ☐ Form 1098-T and education expenses
- ☐ Mortgage interest, property taxes and charitable contributions
- ☐ Estimated tax payments and prior-year return

Special Situations

- ☐ IRS or state notices
- ☐ Marketplace insurance changes
- ☐ Divorce/custody documents relevant to filing
- ☐ Records for home, business, stock or cryptocurrency sales

Bring original, complete documents. Do not email Social Security numbers or identity documents through unsecured email.