
Checklist for Income Tax Clients

Which of these apply to you? We need the actual IRS income forms but totals only for expenses. IRS can ask for actual receipts.

- Please bring all forms W-2, 1099R, SSA-1099, 1099-INT, 1099-DIV, 1099-MISC, 1099-NEC, 1095s, brokerage statements. Everything labeled "Important Tax Document."
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Form 1095-A is mandatory if you have Healthcare.gov insurance.

Driver licenses or picture IDs for both spouses (All clients every year)

Social security cards and birth dates for new clients and new dependents

- Savings account interest may be on the bottom of your December or January statement
- Buys and sells of virtual currency (Bit-Coin and others)
- Unemployment is taxable and you should have received a 1099-G
- Social Security can be taxable and you should have receive SSA-1099
- You must disclose foreign bank accounts to avoid government inquiry
- Alimony not likely in Texas (not child support)
- Long trial jury duty (taxable but expenses are deductible)
- Self-Employment total income and expenses with or without 1099-NEC/1099-MISC box 7
- a) Self-employment expenses list
- b) Self-employment vehicle mileage hopefully with log or
- c) Actual vehicle expenses
- d) Changes in assets/capital equipment – both purchased and removed equipment
- Income and expenses from properties you rent to others with or without 1099-MISC box 1
- Income and expenses from mineral properties you own with or without 1099-MISC box 2
- Classroom expenses paid from personal funds by the teacher
- Military permanent change of station (PCS) unreimbursed expenses
- Health Savings Account contributions not showing on your W-2
- Savings contributions not showing on your W-2
- Student loan interest if you have proof of payment
- Mortgage interest and taxes for home purchase or refinance are listed on HUD-1
- Medical expenses include insurance, co-pays, deductibles, and miles with proof of payment
- Sales tax paid on large items like vehicles, 4-wheelers, large remodeling projects
- Gifts to churches and charities
- Expense receipt for daycare for a dependent on your return including a disabled adult
- Adoption expenses if adoption became final this year or failed last (bring confirming documents)
- Some special tax credits are very unusual but everyone who qualifies knows because of all the work they had to do to get that credit. Be sure to tell us if you have any of these very unusual credits.
- We want all your questions answered. Use additional pages if needed.
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