



Tax Document Checklist

Gather these before we file — check off each item as you collect it.

Personal Information

- ☐ Government-issued photo ID (driver's license or state ID)
- ☐ Social Security cards (or ITIN letters) for you, spouse & dependents
- ☐ Voided check or bank routing + account numbers for direct deposit
- ☐ Last year's tax return (if TY Productions didn't file it)

Income Documents

- ☐ W-2 from every employer
- ☐ 1099-NEC / 1099-MISC (contract & freelance work)
- ☐ 1099-INT / 1099-DIV / 1099-B (bank interest, dividends, stock sales)
- ☐ SSA-1099 (Social Security benefits)
- ☐ 1099-G (unemployment compensation)
- ☐ 1099-R (retirement & pension distributions)
- ☐ Rental income records
- ☐ Alimony received (if divorce finalized before 2019)

Adjustments to Income

- ☐ Traditional IRA / Roth IRA contribution statements
- ☐ Student loan interest statement (1098-E)
- ☐ HSA contribution records
- ☐ Educator expenses (teachers)

Itemized Deductions

- ☐ Mortgage interest statement (1098)
- ☐ Property tax bills / receipts
- ☐ Charitable donation receipts (cash & non-cash)
- ☐ Medical & dental expense totals
- ☐ State & local taxes paid

Business / Self-Employment

- ☐ Income records (invoices, 1099s, payment app summaries)
- ☐ Expense receipts (supplies, software, advertising, insurance)
- ☐ Mileage log (business miles driven)

- ☐ Home office measurements & expenses
- ☐ Vehicle loan interest & registration (if used for business)