

Checklist Pg 1	2023	2024	2025	2026	2027	2028
Tax Check List						
CHANGE OF ADDRESS OR PHONE #						
UPDATED DRIVERS LICENSE						
BANK ACCT INFO (confirm acct & Routing #) (if new provide acct# & routing #)						
SOCIAL SECURITY BENEFITS						
W-2						
1099 R-RETIREMENT/PENSION						
1099 G						
1099 MISC						
1099 NEC						
MORTGAGE INTEREST - Form 1098						
REAL ESTATE TAXES						
HEALTH INSURANCE - Form 1095						
Form 1099 - INTEREST/DIVIDEND INCOME						
STOCK SALES - Form 1099B						
IRA INFO						
SETTLEMENT SHEETS						
BUSINESS EXPENSES						
TAX PAYMENTS (list how many & amount paid per voucher)						

<i>Checklist Pg 2</i>	2023	2024	2025	2026	2027	2028
DEPENDENT INFO						
CHILD CARE EXPENSES						
TUITION (1098 T)						
STUDENT LOAN - Form 1098E						
RENTAL INCOME/EXPENSES						
INTERNET RECEIPTS/OUT OF STATE PURCHASES YOU MADE BUT DID NOT PAY SALES TAX ON						
CRYPTO CURRENCY						

