

Tax Preparation Checklist

(Not all items on this list may pertain to you, use this checklist as a guideline to help gather your documents, that you know is related to your tax filing situation)

- Copy of prior year tax return (if it will be your first time with ATS/Vicky)
- Social Security Numbers & Date of Birth (of new dependents to claim)
- Bank Routing & Account Information for Direct Deposit or Payment (IRS/State)
- W-2
- W-2c (Corrected W-2)
- W-2G (Gambling Winnings)
- 1099-G (Unemployment Income)
- 1099-G (State Income Tax Refunds)
- 1099-INT (Interest Income)
- 1099-DIV (Dividend Income)
- 1099-C (Cancellation of Debt)
- 1099-NEC (Self-Employed/Sub-Contract Income)
- 1099-K (Payments/Compensation received from Sales via PayPal, Square, Uber, Door Dash, Amazon, Lyft, or any merchant or contract work)
- 1099-R (IRS/Pension Distributions)
- SSA-1099 (Social Security Benefits)
- Annual/Year End Tax Statements from Investment Accounts (Fidelity, Morgan Stanley, Charles Schwab, Robinhood, Acorn, TD Ameritrade, etc.)
- If you participated in buy/sell/trade of Bitcoin/Cryptocurrency or Mining, need with Year End Annual Report
- K-1 – (If you are/were a partner of a business, it is possible you will be issued this statement)
- Alimony Received
- Alimony Paid
- Profit and Loss Statement – Business' of all Nature (small business/freelance/independent/self-employed income)
- Rental Property Income and Expense Summary
- Closing Disclosure Statement/Settlement Statement – Purchase/Sale/Refinance of a Home – whether it be primary residence or rental/investment property or 2nd home
- 1098-INT – Mortgage Interest Statement
- Real Estate Taxes Paid – (if not part of escrow)

- Car Taxes/Personal Property Taxes Paid
- State and Income Taxes Paid (these are taxes paid if you owed income taxes the prior year)
- Car Sales Tax Receipt – If you purchased a new vehicle
- Quarterly Estimated Tax Payments made if any – Cancelled Check Image/Receipt of Online Payment for Federal/State
- Form 1095-A (Insurance acquired from the Insurance Health Marketplace with the State)
- Jury Duty Income
- Taxable Scholarships/Grants received (but not all scholarships/grants are taxable)
- 1098-T (Tuition Statement, most likely available online via student portal)
- 1098-E (Student Loan Interest Paid)
- IRA Contributions (Traditional or ROTH or SEP)
- Unreimbursed Moving Expense (for Active Military Members Only)
- Receipt for Solar Panel Purchase (not lease/rental)
- Receipt for e-Vehicle (Tesla/BMW/or all other Electric Vehicle/Plug-In)
- Gambling Losses (only IF you have Gambling Winnings W-2G, cannot exceed the amount of winnings)
- Charitable Donations (Letter from Church or Charitable Institution detailing total amount of Annual donations)
- NON-Cash Charitable Donations i.e., Salvation Army, Purple Heart, etc. (Need the Slip, detailing Items Donated and the Value) – sample Donation Value Guide is available upon request, or visit our website to get one.
- Child Care Cost (Need a Letter/Receipt showing Child Care Providers Name, Tax ID #, Address, and Total Amount Paid for the year)
- Medical and Dental Expenses (to qualify to claim this, you'll need to Itemized, and expenses must be paid out of pocket, and exceed 7.5% of your Adjusted Gross Income)
- For Self-Employed or Freelancers you will either receive a 1099-K or 1099-NEC for the income earned or if none, you will need to provide us with a Summarized Total Income for the year, with a summarized breakdown of your business related expenses.
- Uber/Lyft Drivers – aside from the 1099-k/1099-NEC, please print out the Annual Tax Summary that details the fees paid/deducted from your income

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