



DOCUMENTS CHECKLIST

Name: _____

Tax Year: _____

I DECLARE THAT I HAVE PROVIDED THE DOCUMENTS SELECTED BELOW:

BASIC DOCUMENTATION FOR INCOME TAX RETURN:

- ☐ ID/Passport or Driver's License
- ☐ SSN or ITIN Letter
- ☐ Marriage Certificate
- ☐ Proof of Address for each dependent
- ☐ Birth Certificate for each dependent
- ☐ SSN / ITIN Number for each dependent
- ☐ Copy of the most recent or last year's tax return

SOURCES OF INCOME, SAVINGS, INVESTMENTS, DIVIDENDS AND LOSSES

Please specify the quantity of each form provided.

- ☐ **W-2** Form(s) for Wages, Salaries and Tips _____
- ☐ **Form 1099-NEC** (Nonemployee Compensation) _____
- ☐ **Self-Employment Income and Expenses** _____
- ☐ **Form K-1**: Income from Partnerships, Trusts and S-Corporations _____
- ☐ **Form 1099-G**: Unemployment Compensation Received _____
- ☐ **Form 1099-K**: Payment Card and Third Party Network Transactions _____
- ☐ **Rental Income and Expenses** _____
- ☐ **1099-R**: Distributions from Pensions, Annuities, Retirement Plans or Profit-Sharing, etc. _____
- ☐ **Form SSA-1099**: Social Security Income _____
- ☐ **Form 1099-INT** _____ and **1099-OID** _____ : Interest Income Statements.
- ☐ **Form 1099-DIV**: Dividends and Distributions _____
- ☐ **1099-B** _____ | **1099-DA** _____ : Sales of Stocks and Digital Assets (Cryptocurrencies)
- ☐ Dates acquired and records of your cost or other basis in the property sold _____
- ☐ **Form 1099-SA** _____ or **1099-LTC** _____ : Health Savings Account and Long-Term Care Reimbursements.
- ☐ Transactions involving cryptocurrency (virtual currency) _____
- ☐ **Form W-2G**: Certain Gambling Winnings, as well as related expense records _____
- ☐ **1099-MISC**: Miscellaneous Income; Royalty Income _____
- ☐ **1099-S**: Real Estate Sales; _____ **Other 1099 forms received:** _____
- ☐ **Form 1099-G**: State Tax Refunds: _____
- ☐ **Form 1099-C**: Cancellation of Debt _____

PLANO DE SAÚDE

- ☐ **Forms 1095-A, B or C**
- ☐ **Form 1099-HC**

DEDUCTIONS AND TAX EXPENSES

- ☐ Mortgage Interest Statements (**Form 1098**) _____
- ☐ Real Estate Taxes Paid / Personal Property Taxes
- ☐ Medical Expenses
- ☐ Student Loan Interest Statements (**Form 1098-E**) _____
- ☐ Tuition Statements (**Form 1098-T**) _____
- ☐ Educator Expenses
- ☐ IRA Contributions
- ☐ Casualty and Theft Losses
- ☐ Gambling Expenses
- ☐ HSA, FSA Contributions
- ☐ Daycare Expenses
- ☐ Electric Vehicle Information
- ☐ Residential Energy Efficiency Improvements (for example, solar panels, solar water heaters)
- ☐ Charitable Donations

Signature: _____

Date: _____