



Edgewater Tax & Accounting

Individual Tax Preparation Document Checklist

Personal Information

Bring all the documents below as they apply. Photocopies are fine.

- **Photo ID** – Primary & Spouse
- **Social Security Cards, SSN verification letters, or ITIN assignment letters** – For you, as well as your spouse and/or any dependents.
- **Birth Dates** – For yourself, your spouse, and any dependents on the tax return.
- **Copies of past return(s)** – If you have them, and are a new client, including them is helpful.
- **Identity Protection PIN** – If the IRS or State has assigned you an Identity Protection PIN, please keep it available and ready for filing.

Income

Bring all the documents that apply.

- **W-2 Forms** – For all jobs worked in the tax year being filed.
- **1099/1098 Forms** – Those with a mortgage should have received a 1098. Additional instances where these are issued include “Gig work”, College Tuition, Unemployment Income, IRA distributions, and Social Security Income.
- **Invoices & Expense Report** – Self Employed individuals need to include some financial statements or records detailing business activities in the year.
- **Estimated Tax Payment Records** – Those having made estimated tax payments during the year need to include receipts or another record of those payments.

Expenses

You may be able to claim tax deductions for some of the expenses you have. These deductions reduce the income you are taxed on. Bring documentation for all the following expenses you have.

- **Retirement Contributions**
- **State & Local Taxes Paid**
- **College Tuition & Student Loan Payments**
- **Childcare Expenses**
- **Charitable Donations**
- **Medical Bills**

Other Tax Documents or Notices

If you received a letter or notice from the IRS, State Tax Authority, or other Government Agency please bring those documents as well. Common examples of when we see this include:

- **Health Insurance Marketplace Coverage (Form 1095-A)**
- **Economic Impact Payments (IRS Notice 1444, 1444-B, 1444-C)**
- **Child Tax Credit Advance Payments (IRS Letter 6419)**