

# Tax Checklist

## Important tax Documents

- W-2 From all jobs worked in 2021
- 1099NEC (For contract workers or Temps)
- 1099R for retirement Accounts (IRA)
- 1098 for interest mortgage payments made
- 1098T Tuition statement for college
- 1095A proof of health insurance
- Letter 6875 and 6819 from IRS
- Investment earnings or sales

## Self-employed Docs

- List of expenses for the year
- Client list of received revenue
- Receipt of taxes paid
- Franchise Tax information
- SOS Number
- EIN number
- Tax payer ID number
- Sq Footage of home office use
- Type of business structure (LLC, LLP,C-Corp)

## Additional Documents

- Daycare proof of payment for the yr
- Dependents SSN and DOB
- Drivers License or state ID (copy)
- Receipts from tax preparers, attorney
- IRS payment plan confirmation letter

## Best Practices

- Have questions ready for your tax preparer
- Keep detailed records
- Have a copy of previous year tax return
- Be honest and truthful about your tax situation
- Don't sign anything without reviewing
- ask for your original doc/ and copy of returns

### Notes:

Tax season is busy it is always best to have your expenses totaled and receipts organized

Make sure you have your receipts from any medical expenses

### Notes:

Make sure to have clear, non redacted, documents

Make sure you let your tax preparer know you want your originals returned

### Notes:

Make sure daycare EOY receipt has the daycare EIN and complete address

### Notes:

Follow up with your tax preparer.

Make sure to have realistic expectations set in place