

Tax return document checklist

Curious JP Accounting & Tax Services LLC · IRS Certified Acceptance Agent



Gather these documents before your appointment or upload them in the My Tax Office app.

IDENTIFICATION

- ☐ Valid driver license, ID or passport
- ☐ SSN or ITIN for you, your spouse and dependents
- ☐ Dependents' dates of birth

INCOME

- ☐ W-2 forms from every employer
- ☐ 1099 forms (NEC, MISC, INT, DIV, K, G)
- ☐ Self-employment or independent work income
- ☐ Rental, pension or Social Security income (SSA-1099)

DEDUCTIONS AND CREDITS

- ☐ Form 1095-A if you have Marketplace insurance
- ☐ Child care expenses (provider name and EIN)
- ☐ Form 1098 (mortgage interest) and 1098-T (tuition)
- ☐ Donations and medical expenses with receipts

BUSINESS / LLC

- ☐ EIN and LLC documents
- ☐ Income and expenses for the year (statements)
- ☐ Business vehicle mileage
- ☐ Payroll and contractor payments (1099)

OTHER

- ☐ Last year's tax return
- ☐ Bank account for direct deposit (routing and number)
- ☐ Letters from the IRS or state
- ☐ Estimated tax payments made during the year

Questions? Call or WhatsApp us: (703) 340-4074

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