



Tax Preparation Checklist

Personal Information

- Government-issued ID
- SSN or ITIN
- Prior year return
- Bank account details

Income Documents

- W-2 Forms
- 1099 Forms
- Unemployment (1099-G)
- Social Security (SSA-1099)
- Retirement (1099-R)

Deductions & Credits

- Mortgage Interest (1098)
- Property Taxes
- Charitable Donations
- Medical Expenses
- Childcare & Education Forms

Other Important Items

- IRS Letters
- Health Insurance Forms (1095)
- Estimated Payments (1040-ES)

Start Your Filing Now



U-CONSULTS

Phone: 971-303-8539

Email: info@u-consults.com

Website: tax.u-consults.com