

Tax Documents Checklist



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All Filers

- SSN & DOB (Self, spouse, all dependents)
- Copy of last year's return
- Bank account/routing number
- Loan Statements
- Proof of dependents living in home (Medical bill, school records, etc)

Income

- W-2s from all employers
- 1099s for all forms of income
- 1099 R from retirement accounts
- 1098 for interest and dividends
- Social Security benefits

Home & Rental Property

- 1098s: Interest on mortgage, equity, student loans
- Summary of rental income + expenses
- Paid real estate taxes
- Insurance premiums
- Energy efficient upgrade receipts
- Closing statement- new property purchased
- Mileage (for rental related expenses)

Assets + Liabilities

- Any other assets or loan information

Donations

- Charitable contribution receipts
- Volunteer expense deductions

Tax Documents Checklist

Business Owners

- Tax ID
- 12/31 Bank Balances
- Insurance premiums/expenses
- List of assets and equipment
- Mileage logs
- Business income and expenses
- Quarterly Taxes paid
- Loan Balances
- Annual Payroll Summary
- Form 9929: Business use of home (if applicable)

Deductions

- Medical/Dental Expenses
- Health insurance payments
- IRA + HSA contributions
- Childcare expenses
- Vehicle purchase sales tax
- Moving expenses (if active military)
- Adoption Expenses
- Educational Expenses (loan interest/supplies/tuition)

Other Miscellaneous

- IRA/401K Total Contributions
- FEMA assistance

Contact your Padgett Advisor for tax support:
www.padgettadvisors.com/locations



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