



TAX DOCUMENT CHECKLIST 2026

It has become a security issue for us to receive pictures or files by text. Email is not secure; the preferred and most secure way is thru our SECURE PORTAL. We will not accept information by text.

- **FORM 1095 A, IF HEALTH COVERAGE WAS THROUGH THE “MARKETPLACE” OR OTHER HEALTH INSURANCE DOCUMENTS**
- **DRIVER’S LICENSE (S) REQUIRED FOR TAXPAYER and/or SPOUSE**
- **HSA TAX DOCUMENTS (FORM 1099SA/distribution or 5498SA/contributions)**
- **LAST PAYSTUB TO CAPTURE DEDUCTIBLE OVERTIME PAY; TIPS SHOULD BE REFLECTED ON W2’S**
- **NEW CAR LOAN INTEREST FOR CARS ASSEMBLED IN U.S.**
- **DEPENDENTS’ SOCIAL SECURITY NUMBERS & DATES OF BIRTH**
- **LAST YEAR’S FEDERAL & STATE TAX RETURNS (FOR NEW CLIENTS ONLY)**
- **WAGE STATEMENTS- FORM W-2**
- **PENSION OR RETIREMENT INCOME- FORM 1099-R**
- **INTEREST & DIVIDEND INCOME- FORM 1099-INT/ FORM 1099- DIV**
- **STATE INCOME TAX REFUND AMOUNT- FORM 1099-G**
- **SOCIAL SECURITY INCOME- FORM SSA-1099**
- **UNEMPLOYMENT INCOME- FORM 1099-G**
- **INFORMATION OF SALES OF STOCKS OR BONDS- FORM 1099-B**
- **SELF-EMPLOYED BUSINESS/ FARM INCOME & EXPENSES- FORM 1099-MISC**
- **LOTTERY OR GAMBLING WINNINGS- FORM W-2G**
- **LOTTERY OR GAMBLING LOSSES**
- **ENERGY EFFICIENT HOME IMPROVEMENT COSTS**
- **INCOME & EXPENSES FROM RENTALS**
- **IRA CONTRIBUTIONS**
- **CHILD CARE EXPENSES & PROVIDER INFORMATION**
- **CASH & NONCASH CHARITABLE DONATIONS**
- **MORTGAGE OR HOME EQUITY LOAN INTEREST PAID- FORM 1098**
- **REAL ESTATE TAXES PAID**
- **STUDENT LOAN INTEREST STATEMENTS**