

**CLIENT NAME**

**TELEPHONE NUMBER**

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**INDIVIDUAL CLIENT CHECKLIST**

<input type="checkbox"/> Overtime / Tips	<input type="checkbox"/> Direct Deposit Form	
<input type="checkbox"/> W-2 for wages	<input type="checkbox"/> W-2G for gambling	<input type="checkbox"/> 1099-Int for interest
<input type="checkbox"/> 1099-DIV for dividends	<input type="checkbox"/> SSA-1099 Social Security	<input type="checkbox"/> 1099-B Brokerage
<input type="checkbox"/> 1099-NEC for income	<input type="checkbox"/> 1099-Misc for income	<input type="checkbox"/> 1099-K for income
<input type="checkbox"/> 1099-R for retirement	<input type="checkbox"/> 1099-Int for mortgages	<input type="checkbox"/> 1098-T for tuition
<input type="checkbox"/> 1099-SA for HSA's	<input type="checkbox"/> 1099-G for refunds & unemployment	
<input type="checkbox"/> K-1 forms from investments in S corporations or partnerships		
<input type="checkbox"/> Form 5498 for IRA values	<input type="checkbox"/> IRA and Roth IRA contributions for 2025	
<input type="checkbox"/> Child care costs, and the name, address, amount and ID # of the recipient		
<input type="checkbox"/> Charitable donations-total amounts, dates and recipients		
<input type="checkbox"/> Property tax paid on your home or property	<input type="checkbox"/> Estimated tax payments and dates	
<input type="checkbox"/> Letters received from the IRS or state tax authorities	<input type="checkbox"/> Crypto (forms 8949)	
<input type="checkbox"/> Income and expenses from small business or rental activity		
 <input type="checkbox"/> ***If Overtime or Tips received and not listed on W2, last pay stub of the year or employer statement required with occupation code.***		

**ADDITIONAL NEW CLIENT ITEMS**

Last year's tax return (will be returned to client)

**FOR EVERYONE ON THE RETURN (Spouse, dependents, etc.)**

Full Names       Full Social Security Numbers       Dates of Birth