

CLIENT NAME

TELEPHONE NUMBER

INDIVIDUAL CLIENT CHECKLIST

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|--|--|--|
| <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 | | |

☐ ***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.)

<input type="checkbox"/> Full Names	<input type="checkbox"/> Full Social Security Numbers	<input type="checkbox"/> Dates of Birth
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