

Tax Return Document Checklist

Check and provide if applicable...

- Forms W-2 and Year-End Paystubs (Wages)
- Forms 1099 (Investment, Bank Interest, Retirement, or Self-Employment Income)
- Forms K-1 (Partnerships & Corporations)
- Health Insurance Forms (1095-A, B, C)
- Year-End Mortgage Interest Statements (Form 1098)
- Property Tax Bills (Provide paid receipt if over the age 65)
- Educational Expenses (1098-T)
- Charitable Donation Receipts
- Childcare Provider Information
- Proof of Medical Expenses (Prescriptions, Doctor Visits, etc.)
- Proof of Home Improvements (if claiming tax credits)
- Vehicle Purchase Invoice (Electric/Hybrid Vehicle Tax Credit)
- Statements of Virtual Currency Transactions (if applicable)
- Rental Property Income and Expenses Documentation
- Business Income and Expenses Records
- Prior Year Tax Return (if not prepared by this office)
- Amount of Alimony paid or received and the date it started.
- Dependent(s) tax return(s) if “self-prepared”



Tax Data Organizer (TDO): Complete the enclosed TDO with attention to quarterly estimates (page 1) and mark unchanged information as "unchanged."

Direct Deposit: Provide banking details on page 1 for tax refunds.

Contact Preference: Specify your preferred contact method (email or phone) and the preferred contact person (taxpayer or spouse).

Document Reference: Use your 2023 income tax return as a guide and note any missing prior-year documents.

Tax Notices: Notify the office immediately if you receive any tax notices. Additional fees may apply for responses.

Energy Purchases: If you purchased an electronic/hybrid vehicle or energy-efficient property, include documentation and complete page 2 of the TDO.

Real Estate Taxes: For those filing a PA-1000 rebate, include a paid receipt of real estate taxes.

Summary for Business/Rental Properties:

Submission Formats: Provide data via:

-**QuickBooks Desktop:** Save as a “Backup Copy” on a flash drive with credentials.

-**QuickBooks Online:** Grant “accountant access.”

-**Excel:** Save spreadsheets to a flash drive or email them.

-**Paper/Pen:** Organize neatly, categorize by type, and calculate profit. (see pages 3 & 4)