

Tax Deduction Information and Forms Checklist

This form Covers Most Jobs When a W2 is Issued

Revised December 04, 2022

This form has changed – READ CAREFULLY

The new tax law taking effect for 2018-2025 tax years has eliminated several deductions that we have used in the past. This is a revised list of items that you need when you come to see us for your tax return. We have additional forms on our [downloads](#) page to help in your record keeping.

(Please note: this list is not complete, it is a short summary and more information may be needed on certain items.)

>>This list must be filled in with your totals for a discount to apply.<<

PLEASE DO NOT BRING CHILDREN WITH YOU TO PREPARE YOUR TAXES.

Be prepared – Rescheduling appointments are not available in most cases.

What to bring: Please have everything together before you come for your appointment.
Please fill in your totals in the square next to each question.

Please read this form carefully and completely. If this form is not filled in, you may not receive a discount and we may not get your tax return done. There is no guarantee that I will re-schedule or if I have a time slot available. Or, you can choose to use the standard deduction and possibly a smaller refund.

- W2s from all jobs worked during the year
- 1099s from any self-employed work done
- Accurate list of income from a sideline business
- 1099-Rs from retirement income and investments
- Social Security income form if on social security
- 1099-G if you have any gambling winnings or unemployment income
- 1098-T if you have tuition fees for you, your spouse, or a dependent
- Interest income statements from banks, savings, etc.
- Mortgage Interest form from mortgage company
- Property tax statement from county tax assessor
- HSA documents
- Any other forms that indicate that a copy was mailed to the IRS
- Last pay check stub issued in December (For each taxpayer)
- Copies of social security cards for each dependent if I do not already have a copy
- We will need to make copies of your Driver's License or State issued ID card
- Last year's tax return if we did not do the return
- W2G from gambling facilities (Each one must be entered)

A receipt is a register tape, bank statement, credit card statement, etc.