



MF Accounting, LLC

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INCOME DOCUMENTS	DEDUCTIONS & CREDITS	BUSINESS / SELF-EMPLOYED
■ All W-2s (every employer)	■ Form 1098 (mortgage interest)	■ Business income records
■ 1099-NEC (freelance/gig)	■ Property tax receipts	■ All business receipts
■ 1099-K (Stripe/PayPal/Venmo)	■ Charitable donation receipts	■ Mileage log (date + purpose)
■ 1099-INT (bank interest)	■ Medical expense receipts	■ Home office measurements
■ 1099-DIV (dividends)	■ Tuition — Form 1098-T	■ Contractor W-9s on file
■ 1099-R (retirement dist.)	■ Student loan — Form 1098-E	■ Payroll records
■ SSA-1099 (Social Security)	■ Child care provider + EIN	■ Business bank statements
■ 1099-G (unemployment/refund)	■ HSA & FSA statements	■ Prior year tax return

DOCUMENT RETENTION QUICK REFERENCE

3 YEARS	Returns, W-2s, 1099s, receipts, bank statements	7 YEARS	Worthless securities or suspected fraud
6 YEARS	Underreported income by 25% or more	FOREVER	Filed returns, W-2s, property records, wills, SS cards

Want the full 5-checklist Tax Prep Bundle + Bookkeeping Templates? Get all Colorado-specific checklists for W-2 Employees, Self-Employed, Small Business, Rental Property Owners, and Year-Round Documents — available at mfacct.biz