ROSS & ASSOCIATES®
TAX OFFICE
YOUR VIRTUAL/MOBILE TAX PREPARATION EXPERTS

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Annual Tax Preparation Checklist

A broad organizer for the tax year you are preparing

Taxpayer / household name

Tax year

1 Identity, household & prior-year records

- [ ] Photo ID and Social Security / ITIN records for taxpayer, spouse and dependents
- [ ] Dates of birth, current address and contact information
- [ ] Prior-year federal and state returns and carryforward schedules
- [ ] Dependent residency, relationship, support and childcare records
- [ ] Form 8332, custody documents or other applicable dependent-release records

2 Income records - include every source

- [ ] All Forms W-2; tips and other wage records
- [ ] Forms 1099-NEC, 1099-MISC and 1099-K; cash and other business receipts
- [ ] Forms 1099-INT, 1099-DIV, 1099-B, 1099-S and investment basis records
- [ ] Forms 1099-R, SSA-1099, RRB-1099 and retirement contribution records
- [ ] Forms 1099-G, Schedules K-1 and other income statements
- [ ] Rental, farm, foreign, royalty, gambling and digital-asset transaction records

Check items as gathered. Not every item applies; your preparer will confirm what is needed.

Additional income sources / records to gather

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Deductions, credits, payments & final preparation

3 Expenses, credits & other records

- [ ] Mortgage statements (Form 1098), property taxes and closing / refinance records
- [ ] Charitable-contribution receipts and noncash donation details
- [ ] Medical, dental, health insurance, HSA and long-term-care records
- [ ] Marketplace insurance statement (Form 1095-A), if applicable
- [ ] Education statements (1098-T / 1098-E), receipts, scholarships and grants
- [ ] Childcare provider details and amounts paid; dependent-care benefits
- [ ] Retirement contributions, estimated tax payments and extension payments
- [ ] Energy-improvement / vehicle purchase records and applicable notices
- [ ] Disaster, casualty, theft or insurance-reimbursement records for review

4 Changes your preparer should know

Marriage, divorce, move, household changes, new business or other changes

Missing records / questions for your preparer

Submit sensitive records through the secure method our team provides. Do not send identity documents, SSNs or banking details by ordinary email or text.