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

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General Tax Document Checklist

A concise starting point for individuals and families

Taxpayer / household name

Tax year

Personal & household records

- [ ] Taxpayer, spouse and dependent identification and dates of birth
- [ ] Prior-year returns; IRS / state notices; identity-protection PIN letters
- [ ] Dependent residency, relationship, support and childcare documents
- [ ] Form 8332 or other applicable custody / dependent-release documentation

Income, payments & benefits

- [ ] All W-2s and 1099s, including cash-app / payment-platform statements
- [ ] Retirement, Social Security, investment and digital-asset records
- [ ] Business, rental, farm, foreign, royalty and other income / expense records
- [ ] Estimated payments, extension payments and prior-year refund applied
- [ ] Marketplace Form 1095-A and other applicable benefit statements

Deductions, credits & questions

- [ ] Mortgage / property tax, charitable, medical and education records
- [ ] Childcare, retirement, HSA, energy or vehicle records, when applicable

Items still needed / questions

This is a records checklist, not a determination that an item qualifies for a deduction or credit. Your preparer will review eligibility and may request more information.