Tax Season *Checklist*

Gather what applies to you, check it off, and upload it to your secure portal. Not sure if something counts? Bring it anyway. I'd rather see it and set it aside than miss a credit you've earned. — Danielle

01 About you & your family

- [ ] Photo ID for you (and your spouse, if filing jointly)
- [ ] Social Security cards or ITINs for everyone on the return
- [ ] Dates of birth for all dependents
- [ ] Last year's federal and Georgia returns
- [ ] Bank routing and account number for direct deposit
- [ ] Identity Protection PIN from the IRS, if you have one

02 Income

- [ ] W-2s from every employer
- [ ] 1099-NEC and 1099-K for freelance, gig, and app income
- [ ] 1099-INT and 1099-DIV for interest and dividends
- [ ] 1099-B for stock or crypto sales
- [ ] 1099-G for unemployment or state refunds
- [ ] 1099-R or SSA-1099 for retirement and Social Security

03 Credits & family expenses

- [ ] Childcare provider name, address, EIN, and amount paid
- [ ] 1098-T tuition statements and receipts for books
- [ ] 1098-E student loan interest
- [ ] 1095-A if you bought insurance on the Marketplace
- [ ] Records of charitable donations

04 Homeowners

- [ ] 1098 mortgage interest statement
- [ ] Closing disclosure if you bought or refinanced this year
- [ ] Property tax bills paid (Fulton, DeKalb, Cobb, etc.)
- [ ] Receipts for energy-efficient upgrades
- [ ] Rental income and expenses, if you rent out space

05 Self-employed & creators

- [ ] Profit & loss summary or bookkeeping reports
- [ ] Home office square footage and total home size
- [ ] Business mileage log
- [ ] Equipment, software, and phone expenses
- [ ] Quarterly estimated payments made (dates and amounts)

06 Business owners

- [ ] EIN and articles of organization
- [ ] Year-end balance sheet and P&L
- [ ] Payroll reports (W-3, 941s) and contractor 1099s issued
- [ ] Prior year K-1s and business return
- [ ] Loan statements and asset purchase records

Got an IRS or Georgia DOR letter?

Don't toss it, and don't panic. Upload a photo of every page to your portal and we'll handle it together.