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TAX DOCUMENT CHECKLIST

Your information.
Your starting point.



01 / Personal 02 / Income 03 / Additional

For individual federal and state returns. Check the items you have gathered; not every item applies to every situation.

01 Identification and basic information

- [ ] Current photo ID for you and your spouse, if filing jointly.
- [ ] Social Security or ITIN cards for you, your spouse and each dependent. Check that names match official records.
- [ ] Date of birth for each person included on the return.
- [ ] Current address, phone number and email.
- [ ] Bank account and routing numbers for direct deposit or payment, if applicable.
- [ ] Copy of last year’s federal and state tax returns, if available.

02 Dependents and family care

- [ ] Legal name, date of birth and Social Security number or ITIN for each dependent.
- [ ] Custody information and days the child lived with each parent, if the parents are separated or divorced.
- [ ] Forms 1098-T and records of tuition, books and other eligible education expenses.
- [ ] Name, address, tax ID and total amount paid to a child or dependent care provider.
- [ ] Adoption expense records or disability documents, if applicable.

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Your income. Your records.



03 Income received during the year

- [ ] Forms W-2 from every job.
- [ ] Forms 1099-NEC or 1099-K for self-employment, services, platforms or payments received.
- [ ] Forms 1099-INT, 1099-DIV and 1099-B from banks and investments; include your investment sales summary.
- [ ] Forms 1099-R or SSA-1099 for pensions, retirement distributions or Social Security.
- [ ] Forms 1099-G for unemployment or certain state payments.
- [ ] Rental income: a summary of rent received and related expenses, if applicable.
- [ ] Other income: prizes, taxable scholarships, canceled debt or other tax documents received.

04 Expenses, adjustments and possible credits

- [ ] Forms 1098-E for student loan interest.
- [ ] Forms 1098-T and education receipts not included on the form.
- [ ] Records of contributions to IRAs, HSAs or other tax-favored plans.
- [ ] Charitable donation receipts and other itemized expenses, if you will itemize deductions.
- [ ] Federal and state estimated tax payments made during the year.
- [ ] Records of medical expenses, property taxes and other potentially deductible expenses, if applicable.

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The details.
Your next step.



05 State tax return information

- [ ] States where you lived or worked during the year and approximate moving dates.
- [ ] Wage or withholding records from each state (W-2 and state forms).
- [ ] State estimated payments, credits and tax notices or letters received.
- [ ] For New Jersey residents: rent paid or property tax information, as applicable.

06 If you were self-employed

Bring a business income and expense summary, not only Forms 1099. Include:

- [ ] Income received, even if you did not receive a Form 1099.
- [ ] Expenses by category and main receipts (materials, supplies, advertising, phone, vehicle, insurance and others).
- [ ] Business mileage and total vehicle mileage; dates and purpose of trips.
- [ ] Equipment or asset purchases, business loans and self-employed health insurance payments.

Before sharing your documents

- Provide legible copies and every page of each form.
- If an item does not apply or you did not receive it, tell us. Do not invent or estimate information without discussing it.
- This is a general guide. Your situation may require additional documents.

Keep sensitive information secure. Ask Basora for the secure delivery method; do not send tax documents through the website contact form.