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Tax Document Checklist

Check off each item as you gather it, then upload your documents to the client portal.

Please note: Do not write Social Security or bank account numbers here. Jeff collects those securely through the portal.

Your name

Income

- [ ] W-2 from each employer
- [ ] 1099-INT (interest)
- [ ] 1099-B (investment sales)
- [ ] SSA-1099 (Social Security)
- [ ] K-1 from partnerships, S corps or trusts
- [ ] Rental income and expense summary
- [ ] 1099-NEC or 1099-MISC
- [ ] 1099-DIV (dividends)
- [ ] 1099-R (retirement distributions)
- [ ] 1099-G (unemployment or state refund)
- [ ] 1099-K from payment apps or marketplaces
- [ ] Business income and expense summary

Deductions and credits

- [ ] 1098 mortgage interest statement
- [ ] Charitable donation receipts
- [ ] 1098-T tuition statement
- [ ] Child care provider name, address, tax ID
- [ ] Property tax bills
- [ ] Medical and dental expenses
- [ ] 1098-E student loan interest
- [ ] HSA forms 5498-SA and 1099-SA

Other documents

- [ ] Estimated tax payments made, with dates
- [ ] Last year's return (new clients)
- [ ] Refund bank details (provide via portal only)
- [ ] 1095-A if you had Marketplace insurance
- [ ] Any IRS or North Carolina letters

Return this form through your secure client portal at jbsmithcpa.sharefile.com or bring it to your appointment. Please do not email it.