



Hassle-Free Drop-Off Checklist

Client Name: Date:

Phone: Email:

Identification & Basics

- Photo ID (taxpayer and spouse if filing jointly)
- Social Security cards/ITIN letters for taxpayer, spouse, and dependents (or prior return with full SSNs)
- Bank routing and account number for direct deposit or payment
- Copy of last year's tax return (recommended for new clients)
- Any IRS or Arizona Department of Revenue letters/notices

Income Documents

- W-2s (all employers)
- 1099-NEC / 1099-MISC (contractor income)
- 1099-K (payment apps/online platforms)
- 1099-INT / 1099-DIV (interest/dividends)
- 1099-B / brokerage statements (stocks/crypto)
- SSA-1099 (Social Security)
- 1099-R (retirement/pension)
- 1099-G (unemployment)
- W-2G (gambling winnings), if applicable

Deductions & Credits

- Mortgage interest (Form 1098) and property tax statements
- Charitable donation receipts
- Student loan interest (1098-E)
- Education expenses (1098-T and related receipts, if applicable)
- Childcare expenses + provider info (name, address, EIN/SSN)
- HSA forms (1099-SA, 5498-SA), if applicable
- Marketplace health insurance (1095-A), if applicable

Self-Employed / Business / Rental (If Applicable)

- Income summary (1099s and/or bookkeeping records)
- Expense totals or receipts (supplies, advertising, phone, etc.)
- Mileage log (business miles and total miles)
- Home office information (sq ft and expenses), if applicable

Hassle-Free Drop-Off Checklist (continued)

Rental income and expense summary, if applicable

Life Changes & Other

- Marriage/divorce paperwork, if applicable
- New baby/dependent documents, if applicable
- Home purchase/sale closing statements (Closing Disclosure/HUD-1)
- Estimated tax payments made (dates/amounts)
- Voided check (optional) for direct deposit verification

Notes / Questions for Our Team