You and your household

One dependent below; attach another sheet for additional dependents. Use Not sure when needed.

Tax year (YYYY)

Marital status Dec. 31

Select

Can anyone claim you?

Select

Your full legal name

Your birth date

Your SSN / ITIN

Your occupation

Your phone

Your email

Spouse full legal name

Spouse birth date

Spouse SSN / ITIN

Spouse occupation (or N/A)

Expected state return count

Mailing street and apartment

City

State

ZIP code

Dependent - repeat on an extra sheet for each additional person

Dependent full legal name

Dependent birth date

Dependent SSN / ITIN

Relationship to you

Months in your home

Student?

Select

Disability?

Select

Support arrangements

Custody arrangements

Form 8332, if applicable

Select

More dependents on extra sheet?

Select

States / localities to file in

Where you lived / worked and move dates

Your income documents

Check what you have. Enter how many documents you will upload, not how many pages.

No document? Leave its box blank and enter 0. Not sure? Leave the count blank and tell us below.

☐	W-2 - wages from a job	How many?
☐	1099-INT - bank / other interest	How many?
☐	1099-DIV - dividends	How many?
☐	1099-B or brokerage tax statement - investment sales	How many?
☐	1099-R - retirement / pension / IRA withdrawals	How many?
☐	SSA-1099 - Social Security benefits	How many?
☐	1099-NEC - self-employment income	How many?
☐	1099-MISC - miscellaneous income	How many?
☐	1099-K - payment app / card transactions	How many?
☐	1099-G - unemployment / other government payments	How many?
☐	Schedule K-1 - business / trust income	How many?
☐	W-2G - gambling winnings	How many?
☐	Business income / expense records	How many?
☐	Rental income / expense records	How many?
☐	Digital asset / foreign income records	How many?
☐	Other income documents	How many?

Documents you are waiting for, or questions for us:

Your other documents

Check what you have. Enter how many documents you will upload. We will review what applies.

☐ 1098 - mortgage interest	How many?	
☐ 1098-T - college tuition	How many?	
☐ 1098-E - student loan interest	How many?	
☐ 1095-A - Marketplace health insurance	How many?	
☐ 1099-SA / 5498-SA - HSA records	How many?	
☐ IRA / retirement contribution records	How many?	
☐ Childcare costs and provider details	How many?	
☐ Charitable gifts / medical expense records	How many?	
☐ Property tax / other tax records	How many?	
☐ Energy / vehicle / adoption credit records	How many?	
☐ Estimated / extension payment confirmations	How many?	
☐ Prior federal / state returns and carryover schedules	How many?	
☐ IRS / state notices and issued IP PINs	How many?	
☐ Photo identification	How many?	
☐ Other supporting records	How many?	

Missing documents or anything you want us to know:

Completed by

Date completed

Save this PDF. Sign in to your client portal > Documents > Upload. Upload this checklist and your documents. Do not email completed forms. Need help? Call 719-694-9005.