

Document Checklist

Personal

- Your valid, unexpired government-issued ID.
- Your spouse's valid, unexpired government-issued ID.
- Your Social Security Number (SSN) or Tax Identification Number (TIN).
- Your spouse's full name and Social Security Number (SSN) or Tax Identification Number (TIN).

Dependent(s)

- Dates of birth and Social Security numbers (or other tax ID numbers).
- Childcare records, including the provider's tax ID number (if applicable).
- Form 8332, if the custodial parent is releasing their right to claim a child to the noncustodial parent (if applicable).

Income

Employed

- W-2 Forms.

Unemployed

- 1099-G form for unemployment benefits.

Self-Employed

- Forms 1099-NEC and 1099-K.
- Home office information (if applicable).
- Records of estimated tax payments made (Form 1040-ES).
- Income records to verify amounts not reported on 1099 forms.
- Business asset details (cost, date placed in service, etc.) for depreciation.
- Documentation of all expenses, including check registers, credit card statements, and receipts.

Rental Income

- Income and expense records.
- Record of estimated tax payments made (Form 1040-ES).
- Rental property asset details (cost, date placed in service, etc.) for depreciation.

Retirement Income

- Pension, IRA, or annuity income (Form 1099-R).
- Traditional IRA basis (prior-year Forms 8606 showing amounts already taxed).
- Social Security or Railroad Retirement Benefits (SSA-1099, RRB-1099).

Savings & Investments or Dividends

- Expenses related to your investments.
- Record of estimated tax payments made (Form 1040-ES).
- Cost basis of cryptocurrencies, NFTs, and other similar assets sold.
- Interest and dividend income (Forms 1099-INT, 1099-OID, 1099-DIV).
- Income from the sale of stocks or other property (Forms 1099-B, 1099-S).
- Forms 1099-B and/or 1099-DIV for cryptocurrencies, NFTs, and other similar income or losses.
- Dates of acquisition and records of your cost or other basis in property sold (if basis is not reported on Form 1099-B).

Other Income & Losses

- Trust income.
- Jury duty records.
- Prizes and awards.
- State refunds (Form 1099-G).
- Royalties (Form 1099-MISC).
- Any other 1099 forms received.
- Hobby income and related expenses.
- Income from K-1s (as an investor or active owner).
- Health Savings Account (HSA) and long-term care reimbursements (Forms 1099-SA or 1099-LTC).'
- Gambling income (Form W-2G or records showing income, along with expense documentation).

Home Ownership

- Form 1098 or other mortgage interest statements.
- Records of real estate and personal property taxes.

Charitable Donations

- Miles driven for charitable purposes.

- Documentation of non-cash charitable contributions.
- Cash donations to religious organizations, schools, or other charitable groups.

Medical Expenses

- Miles driven for medical purposes.
- Payments made for healthcare insurance, doctors, dentists, and hospitals.
- Travel expenses for medical care, including hotel stays, flights, tolls, parking, etc.

Health Insurance

- Form 1095-A, if you have health insurance through a State Marketplace (Exchange).

Childcare Expenses

- Wages paid to a babysitter.
- Daycare expenses for a child under age 13 to enable the taxpayer (and spouse) to work.

Education Expenses

- Form 1098-E for student loan interest.
- Records of scholarships or fellowships.
- Form 1098-T from educational institutions.
- Receipts for qualified educational expenses.

State & Local Income Taxes or Sales Tax

- Amount of real estate taxes paid.
- Amount of personal property taxes paid.
- Invoices for large item purchases, such as cars, boats, motorcycles, etc.
- Amount of state or local income tax paid (other than wage withholding) or state and local sales tax paid.

Retirement & Other Savings

- Form 5498 showing IRA contributions.
- Form 5498-SA showing HSA contributions.
- Any other 5498-series forms (e.g., 5498-QA, 5498-ESA).

Federally Declared Disaster

- FEMA assistance information.
- Records of rebuilding or repair costs.



- Insurance reimbursements or pending claims.
- City or county where you lived, worked, or owned property.
- Documentation to support property losses (e.g., appraisals, cleanup costs, etc.).

Call [860-259-7733](tel:860-259-7733) or visit www.cttaxservices.com for more information.