Tax Preparation Checklist
K2 Services Inc

First Time Clients Only

- [ ] Copy of Previous Years Tax Return
- [ ] Social Security Numbers (including spouse & children)

All Clients

- [ ] Drivers License
- [ ] Bank Info for Direct Deposit
- [ ] Proof of Medical Coverage (1095-A, 1095-B, or 1095-C)

Income

- [ ] Unemployment Compensation
- [ ] Employment & Income Data
- [ ] W-2's for Current Tax Year
- [ ] Interest Income (1099-INT)
- [ ] Dividend Income (1099-D)
- [ ] Pensions & Annuities (1099-R)
- [ ] SSI Statement
- [ ] Alimony Received
- [ ] Tax Refunds
- [ ] Gambling/ Lottery Winnings (W2-G)
- [ ] Misc. Income (including rent; 1099-MISC)
- [ ] Stock/ Bond Tax Statements
- [ ] Mutual FundTax Statements
- [ ] Annuity Year Tax Statements
- [ ] Student Loan Interest Paid (1098-E)
- [ ] Education (1098-T)
- [ ] Self-Employment Data (1099-NEC)
- [ ] Business Profit & Loss Statement
- [ ] K-1's

Deductions

- [ ] Medical Expenses (Total)
- [ ] Estimated Tax Payments Made
- [ ] Sales Tax for Large Purchases (Cars, Boats, etc.)
- [ ] Real Estate Taxes Paid
- [ ] DMV Registration Fees
- [ ] Mortgage Interest (1st or 2nd Mtg; 1098-INT)
- [ ] Real Estate Transactions (1099-S)
- [ ] Final Escrow Closing Statement (HUD) if you sold a home
- [ ] Receipts for Goods Donated to Charity
- [ ] Monetary Gifts to Charity/ Church
- [ ] Child Care Expenses (including providers phone #, address, & TIN)
- [ ] Alimony Paid (including SSN of recipient)