

New Client
Tax Preparation Checklist
K2 Services Inc

MUST PROVIDE:

Copy of Previous Year Tax Return
Social Security Numbers (including
spouse & children)

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

Income

- ☐ W-2's for 2025 Tax Year
- ☐ Unemployment Compensation
- ☐ Interest Income (1099-INT)
- ☐ Dividend Income (1099-DIV)
- ☐ Pensions & Annuities (1099-R)
- ☐ SSI Statement
- ☐ Alimony Received
- ☐ Tax Refunds
- ☐ Gambling/ Lottery Winnings (W2-G) Misc. Income (including rent; 1099-MISC)
- ☐ Student Loan Interest Paid (1098-E)
- ☐ Education (1098-T)
- ☐ Self-Employment Data (1099-NEC)
- ☐ Business Profit & Loss Statement
- ☐ K-1 (S Corps & Partnerships)

Deductions

- ☐ Medical Expenses (Total)
- ☐ Estimated Tax Payments Made in 2025
- ☐ 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)
- ☐ SSN of recipient