



TAX DOCUMENT CHECKLIST

REQUIRED FOR NEW TAX CLIENTS

- Copy of last year's tax return
- Copy of driver's license
- Social security cards for all dependents
- Bank account/routing number
- Quarterly taxes paid (if applicable)

INCOME

- W2's from all employers
- Social Security statement
- 1099 forms for all other income (interest, dividends, miscellaneous, etc.)
- 1099-R retirement and pension
- Copy of K-1 from Partnership or S Corp

RENTAL PROPERTIES OWNERS

- Rental Income
- Rental property address
- Expenses accrued by category
- Mileage for repairs, inspections, etc.
- Number of days the property was rented.
- Mortgage interest paid
- Real estate taxes paid

OTHER DOCUMENTS

- Copy of mortgage statement
- Student loan interest form
- Education expenses
- Retirement plan contributions
- Health care 1095-B (for 2018 returns and prior)
- Child care expenses
- Charitable contributions
- Medical expenses (including mileage)

SELF EMPLOYED FILERS

- Name of business and tax ID (if applicable)
- Type of service/product offered
- Annual income earned
- Expenses accrued by category (i.e., accounting, advertising, office supplies, contractors, etc.)
- List of capital assets and equipment
- Business use of home information (size of home, size of designated home office space, total expenses accrued by category)
- Vehicle business use information (mileage log, year, make and model of vehicle, total personal mileage.)

SCN DOCUMENTS TO REQUEST

Here at SCN we have documents and templates to help you gather any information you may need to file your return. Please feel free to reach out and request any of these documents;

- Income and Expense template
- Vehicle expense log
- Home office deduction sheet
- Rental property template