

— TAX SEASON

Tax-season document checklist

The documents to gather before your return, in the order we ask for them.
Tick what you have. We'll ask for the rest.

DUE TO US

Feb 28

NAME

TAX YEAR

PARTNER

INCOME

- ☐ W-2s from each employer
- ☐ 1099-NEC and 1099-MISC
Contract and other income
- ☐ 1099-INT, 1099-DIV and 1099-B
Banks and brokerages
- ☐ K-1s from partnerships, S corporations and trusts
- ☐ Social Security and pension statements

BUSINESS

- ☐ Profit and loss for the year
- ☐ Mileage log
- ☐ Home office measurements
- ☐ 1099s you issued

NOTES FOR YOUR PARTNER**DEDUCTIONS**

- ☐ 1098 mortgage interest
From your lender
- ☐ Property tax bills
- ☐ Charitable receipts
- ☐ Childcare costs and provider tax IDs
- ☐ Health savings account statements

PRIOR YEAR

- ☐ Last year's federal and state returns
- ☐ Any notices received
- ☐ Estimated payments made, with dates

NOTE This checklist is general information for federal individual returns. It is not tax advice for your situation; your advisor will tell you which other documents you need.

Ashcombe & Rhee, CPAs
118 West 27th Street, Floor 6
New York, NY 10001 · (212) 555-0148
Send documents through the client portal.