

# Tax Document Checklist

Bring these to your accountant so your return is accurate the first time. You do not send anything to BalancedRow — this is for you and the licensed accountant you choose. Only share documents after you have verified who they are.

## WHAT TO BRING

**Personal · income · deductions · business**

## Personal & identity

Document	Have it
Photo ID for you (and spouse)	<input type="checkbox"/>
Social Security numbers or ITINs for everyone on the return	<input type="checkbox"/>
Last year's tax return (if you have it)	<input type="checkbox"/>
Bank routing & account number for direct deposit	<input type="checkbox"/>

## Income

Document	Have it
W-2 forms from each employer	<input type="checkbox"/>
1099-NEC / 1099-K for self-employment or gig work	<input type="checkbox"/>
1099-INT / 1099-DIV for interest and dividends	<input type="checkbox"/>
1099-G for unemployment	<input type="checkbox"/>
Records of any other income (cash, rental, foreign)	<input type="checkbox"/>

## Deductions & credits

Document	Have it
Childcare provider name, address, and tax ID	<input type="checkbox"/>
Tuition (1098-T) and student-loan interest (1098-E)	<input type="checkbox"/>
Mortgage interest (1098) and property tax records	<input type="checkbox"/>

Charitable donation receipts	■
Medical expense records	■
Retirement contribution records (IRA, etc.)	■

## If you are self-employed or own a business

Document	Have it
Income summary for the year	■
Expense records by category	■
Mileage log	■
Home-office square footage	■
Estimated tax payments made during the year	■

*Tip: never email your full SSN or ITIN. Ask your accountant for a secure upload portal.*

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Free guide from BalancedRow · Get matched, free, with a licensed accountant at [balancedrow.com](https://balancedrow.com)