What to Bring: Tax Checklist

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Bring the items that apply to you. Check them off as you gather them, and you'll be ready for your appointment.

1. Identification

- [ ] Driver's license or state ID (you and your spouse)
- [ ] Social Security numbers and dates of birth for everyone on the return
- [ ] Bank routing and account number for direct deposit

2. Last Year's Return

- [ ] Full copy of last year's federal and state tax returns
- [ ] Prior-year depreciation schedules, if you have business or rental property
- [ ] Any letters or notices from the IRS or Arkansas DFA

3. Life Changes This Year

- [ ] Marriage, divorce, or a new dependent
- [ ] Bought or sold a home or other property
- [ ] Started, bought, or closed a business
- [ ] Retired or started receiving Social Security

4. Current-Year Income

- [ ] W-2s from every employer
- [ ] 1099s: interest, dividends, brokerage, retirement, Social Security, unemployment, and contract work
- [ ] K-1s from partnerships, S corporations, estates, or trusts
- [ ] Business or rental income and expense records

5. Deductions & Credits

- [ ] Mortgage interest (Form 1098) and property tax statements
- [ ] Charitable contribution receipts
- [ ] Childcare provider name, address, tax ID, and amount paid
- [ ] Education forms (1098-T, 1098-E)
- [ ] Health insurance marketplace (1095-A) and HSA statements
- [ ] Estimated tax payments made during the year (federal and state)

How to send your documents

Upload them through the secure file portal on the **Client Center** page at zachstevenscpa.net, or drop them off at the office by appointment. Please don't email documents that show Social Security or account numbers.

Not sure whether something matters? Bring it and we'll sort it out together. Questions? Call 479-208-6705.