



Precise Tax Preparation &
Financial Solutions, LLP

Tax Check List:

If you have:	You should have the following:
1. Dependents	<ul style="list-style-type: none">• Copy of ID and SSN
2. Employment Income	<ul style="list-style-type: none">• W-2
3. Self-Employment Income	<ul style="list-style-type: none">• 1099 – Misc. or written records
4. Retirement Income	<ul style="list-style-type: none">• 1099-R
5. Business Income	<ul style="list-style-type: none">• K-1
6. Social Security Income	<ul style="list-style-type: none">• SSA - 1099
7. Interest or dividends	<ul style="list-style-type: none">• 1099 INT or DIV
8. Unemployment	<ul style="list-style-type: none">• 1099 – G
9. Student Loans	<ul style="list-style-type: none">• 1098 - E
10. Charitable contributions	<ul style="list-style-type: none">• Written documents
11. Mortgage	<ul style="list-style-type: none">• 1098, property tax, etc.
12. Paid Rent	<ul style="list-style-type: none">• Renter's rebate
13. (buy/sell) a home	<ul style="list-style-type: none">• 1099 - S
14. Moving expenses (50 miles +)	<ul style="list-style-type: none">• Written documentation
15. Post-secondary education expenses	<ul style="list-style-type: none">• 1098 – T
16. k-12 education expenses	<ul style="list-style-type: none">• Written documentation
17. HAS distributions	<ul style="list-style-type: none">• 1099 – SA
18. Child care expenses	<ul style="list-style-type: none">• EIN or SSN of provider
19. Gambling winnings	<ul style="list-style-type: none">• W – 2G

To speak to a Tax Preparer, please contact our office at 469-200-4006!