

HUBBARD, ROSS, & ASSOCIATES, LLC

361 17th Street NW, Suite 1723 • Atlanta, GA 30363
(404) 771-5340 • info@hubbardandross.com • hubbardandross.com

TAX RESOURCES

Tax Preparation Checklist

Everything to bring to your appointment — for individuals, self-employed filers & business owners

PERSONAL & FAMILY INFORMATION

- ☐ Government-issued photo ID (you and spouse, if filing jointly)
- ☐ Social Security cards or ITIN letters — you, spouse, and all dependents
- ☐ Dates of birth for you and all dependents
- ☐ Bank account and routing number, for direct deposit
- ☐ Prior-year federal and state tax returns (new clients)
- ☐ Prior-year AGI and self-select PIN, if e-filing
- ☐ IRS Identity Protection PIN (IP PIN), if one was issued
- ☐ Current mailing address — note if it changed this year

INCOME DOCUMENTS (W-2s & 1099s)

- ☐ W-2 — wages from each employer
- ☐ 1099-NEC — freelance / independent contractor income
- ☐ 1099-K — payment apps and online marketplace income
- ☐ 1099-INT — interest income
- ☐ 1099-DIV — dividends and distributions
- ☐ 1099-R — retirement, pension, or annuity income
- ☐ SSA-1099 — Social Security benefits
- ☐ 1099-G — unemployment compensation or state tax refund
- ☐ 1099-MISC — rents, royalties, or other income
- ☐ Schedule K-1 — partnership, S-corp, or trust income
- ☐ W-2G — gambling or lottery winnings
- ☐ Records of cryptocurrency / digital asset transactions

HEALTH INSURANCE

- ☐ Form 1095-A — Health Insurance Marketplace statement
- ☐ Form 1095-B or 1095-C, if applicable
- ☐ HSA / FSA contribution and distribution statements

DEDUCTIONS & CREDITS

- ☐ Form 1098 — mortgage interest statement
- ☐ Property tax bills or statements
- ☐ Form 1098-E — student loan interest
- ☐ Form 1098-T — tuition, plus book and course-material receipts
- ☐ Childcare provider's name, address, and federal Tax ID
- ☐ Charitable donation receipts (cash and non-cash)
- ☐ Medical and dental expense records, if itemizing
- ☐ IRA / retirement plan contribution records
- ☐ Educator expense receipts (K-12 teachers)

SELF-EMPLOYED & BUSINESS OWNERS

- ☐ Profit & loss statement or bookkeeping records
- ☐ Business bank and credit card statements
- ☐ Receipts for business expenses (supplies, advertising, insurance)
- ☐ Mileage log or vehicle expense records
- ☐ Home office square footage, if claiming the deduction
- ☐ Records of business asset purchases (equipment, vehicles)
- ☐ Estimated tax payments made during the year
- ☐ Statements from payment apps or online marketplaces

BUSINESS ENTITIES (S-CORP / LLC / PARTNERSHIP)

- ☐ Prior-year business tax return
- ☐ Payroll records — Forms W-2/W-3, 941, 940
- ☐ Schedule K-1s issued to owners or partners
- ☐ EIN confirmation letter (new entities)
- ☐ Formation documents (Articles of Organization/Incorporation)
- ☐ Owner/member contribution and distribution records

LIFE EVENTS & OTHER

- ☐ Closing statement for a home purchase or sale
- ☐ Marriage, divorce, or legal name-change documents
- ☐ Adoption or new dependent paperwork
- ☐ Any IRS or state tax notices received during the year

Not sure if something applies to you?

Bring what you have — we'll help you identify anything that's missing before we file. Questions before your appointment? Call (404) 771-5340 or email info@hubbardandross.com.