

Tax Document Checklist

TAX YEAR 2026 | 2027 FILING SEASON | DRAFT FOR REVIEW

Client name: _____ Date: _____

Mark documents available or not applicable. Submit only through an approved secure channel. Do not attach confidential records to public forms.

[ ] Photo ID / SSN or ITIN documentation as requested

[ ] W-2 / 1099 / retirement / unemployment / other income

[ ] Business income, expense, mileage and asset records

[ ] Dependent relationship, residency and support evidence

[ ] Marketplace Form 1095-A / education Form 1098-T

[ ] Childcare receipts / provider information

[ ] Mortgage, charitable, medical and other deduction records

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[ ] Prior return / estimated payments / IRS or state notices

[ ] IP PIN if issued (provide securely) / bank details if requested

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Client signature: _____ Date: _____

Spouse signature (if applicable): _____ Date: _____