Taxes by Tan Jay, LLC

Individual Tax Return Checklist

Gather the items that apply to your return.

[ ] Identification & taxpayer information

Photo ID and Social Security or ITIN documentation for taxpayers and dependents, as applicable.

[ ] Income documents

W-2s, applicable 1099s, and records of other income.

[ ] Dependent & household records

Residency, support, childcare, or education documents when relevant.

[ ] Additional tax documents

Relevant health coverage, education, retirement, deduction and tax-payment records. If self-employed, also use the business checklist.

[ ] Previous returns & IRS letters

A prior-year return and any tax notices or correspondence that need review.

Protect your personal information. Ask Tan for the designated secure document-upload method. Do not send Social Security numbers, W-9s or tax records through social media or regular email.

Self-employed clients should also bring the business checklist documents.

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