LOYALTY TAX, LLC

Your tax-day checklist

A little preparation. A smoother start.

Let’s get ready, together.

Gather the items that apply to you. Melissa can help you identify anything else you need.

01 YOUR HOUSEHOLD

- ☐ Current photo ID for you and your spouse, if filing jointly
- ☐ Social Security cards or ITIN letters for everyone on the return
- ☐ Dates of birth and dependent information; custody or residency records, if applicable
- ☐ Last year’s tax return and IRS Identity Protection PINs, if issued

02 YOUR INCOME

- ☐ W-2s and all 1099s, including gig work, interest, retirement, and investments
- ☐ Self-employment income records, including cash and electronic payments
- ☐ Business expense summaries, mileage logs, and equipment purchase records
- ☐ Rental income and expense records, if applicable

03 OTHER DOCUMENTS THAT MAY APPLY

- ☐ Childcare provider name, address, tax ID, and amounts paid
- ☐ Education forms (1098-T) and student loan interest statements (1098-E)
- ☐ Marketplace health insurance Form 1095-A, if applicable
- ☐ Mortgage interest, property tax, charitable gift, and medical expense records
- ☐ Estimated tax payment confirmations and IRS or state tax notices

04 BEFORE WE BEGIN

- ☐ Bank routing and account information if requesting direct deposit
- ☐ Your questions and any changes in marriage, dependents, work, or address
- ☐ For an advance application: ask Melissa about additional required documents

Melissa Loya | In-person & virtual tax help

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Call or text to arrange an appointment and a secure way to share documents.

Do not send Social Security numbers or tax documents by regular text or email.

Starter checklist only. Required documents vary by return. Bring complete records that apply to you.