

Burkin's Tax & Accounting, Inc.

Tax Season Preparation Checklist



Income Documents

- W-2 forms from all employers
- 1099-NEC / 1099-MISC (freelance or contractor income)
- 1099-INT / 1099-DIV (interest and dividends)
- 1099-K (gig work, online sales, payment platforms)
- 1099-R (retirement distributions)
- SSA-1099 (Social Security benefits)
- Schedule K-1s from partnerships, S-corps, or trusts

Deductions & Credits

- Charitable giving receipts
- Mortgage interest statement (Form 1098)
- Property tax statements
- Medical and dental expense receipts
- Tuition/education statements (Form 1098-T)
- Childcare provider statements and receipts
- Adoption-related documentation
- Energy-efficient home improvement receipts
- Electric or clean vehicle purchase documentation

Small Business / Rental

- Profit & loss (income) statement
- Business bank and credit card statements
- Receipts for business expenses
- Mileage log for business vehicle use
- Asset purchase records (equipment, furniture, etc.)
- Rental income records
- Rental property expense receipts and statements

Digital Assets

- Cryptocurrency or digital asset transaction history
- Buy/sell and gain/loss reports
- Exchange or platform statements

IRS Account & Compliance

- IRS letters and notices from the year
- Identity Protection PIN (IP PIN), if applicable
- Estimated tax payment records
- Copy of prior year tax return

Filing Essentials

Bank routing and account number for direct deposit

Updated mailing address and contact information

Social Security numbers or ITINs for all dependents

Health insurance statements (Form 1095-A, if applicable)