

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)