

Tax Document Checklist - GigTaxx.com

Upload the following:

- Last Year's Tax Return (New Clients Only)
- Driver's License or State ID – current and not expired
- Bank Account Routing and Account Number (for Direct Deposit and Direct Debit)
- SSNs and birthdates of yourself and everyone in your household

Typical Tax Documents:

- W2 forms from your Employer (one for each job)
- 1099-INT from your Bank (if you had interest income)
- 1099-B and 1099-DIV (if you had investment income)
- Cryptocurrency transactions (if any)
- 1099-NEC for Contractors and Self-Employed
- 1099-G Unemployment Income Statement (if any)
- 1099-SA from your Health Savings Account (if any)
- 1099-MISC for Rental or Royalty income (if any)
- 1099-R Statement (if you withdrew from a retirement account)
- 1099-SSA Retirement Income Statement (if any)
- K-1 forms for Partnership, S Corp, or Estate/Trust income (if any)
- 1098-T Tuition statement from your school
- 1098-E Student Loan Interest Statement (if you made payments on student loans) AND total student loan payments made with remaining balance of loan
- 1095-A, 1095-B, or 1095-C Health Insurance Statement
- Retirement Contributions (Roth IRA, Traditional IRA, SEP IRA, Simple IRA, Solo 401K, etc)
- 1098 Mortgage Interest Statement from your Lender
- Property Tax Statement (for homeowners)
- Closing Settlement Statement (if you bought or sold home or real estate)
- Charitable Donation Records/Receipts
- Car Tabs (renewals each year)
- Health Savings Account (HSA) Contributions
- Medical Expenses (only if you had a lot of medical expenses > 7.5% of your income)
- Child Care Expenses (including address & Tax ID of provider)
- K-12 Education expenses - MN only (after school enrichment, tutoring, arts, music lessons, not sports)

Business Records for Self-Employed Individuals (such as spreadsheets, Profit & Loss Statement):

- Records of your income (including all cash, checks, 1099-MISC, 1099-NEC, and PayPal, Venmo, etc)
- Records of business expenses such as: advertising expenses, office expenses, mileage, phone, internet, equipment purchases, rentals, tools, software, supplies, travel expenses (airfare, lodging car rental, parking).
- Home Office information (sq ft of home, sq ft of home office)
- Records of self-employed health insurance costs.
- Records of quarterly taxes (FED and STATE) paid during the year.