Tax Document Checklist

MJ ACCOUNTING AND PROFESSIONAL SERVICES CORP

Use this checklist to gather documents before your tax appointment or upload them securely through the client document upload link.

Personal Information

- Government-issued photo ID
- Social Security numbers or ITINs for taxpayer, spouse, and dependents
- Current address, phone number, and email address
- Bank routing and account number for direct deposit
- Prior-year tax return, if available

Income Documents

- W-2 forms
- 1099 forms, including 1099-NEC, 1099-MISC, 1099-INT, 1099-DIV, and 1099-K
- Self-employment income records
- Rental income records
- Retirement, Social Security, pension, or unemployment income statements
- Marketplace health insurance forms, if applicable

Deductions and Credits

- Childcare expenses and provider information
- Education expenses and Form 1098-T
- Mortgage interest and property tax statements
- Charitable contribution records
- Medical expense records, if applicable
- Energy credit, dependent care, or other credit-related documents

Business or Self-Employed Clients

- Income and expense summary
- Business bank and credit card statements
- Mileage log and vehicle expense records
- Receipts for major purchases, equipment, or supplies
- Estimated tax payment records
- 1099s issued to contractors, if applicable

Business Formation and Compliance

- Articles of organization or incorporation
- EIN confirmation letter
- Operating agreement or corporate records, if available
- Sales tax, payroll, or state registration notices
- Annual report, BOI report, or notice letters received

Please upload copies rather than originals unless specifically requested. If you are unsure whether a document applies to you, include it for review.