

# Integrity Tax TAXPAYER CHECKLIST

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## Taxpayer / Dependent Information

- Full name
- Date of Birth
- Social Security Card / ITIN / ATIN
- Prior year tax return
- Valid unexpired state issued ID or driver's license

## Income and Tax Documentation

- W-2
- Interest (1099-INT)
- Dividend (1099-DIV)
- IRA / 401(k) distribution (1099-R)
- Pension income (1099-R)
- Social Security (1099-SSA)
- Railroad retirement (RRB-1099)
- Independent contractor (1099-NEC)
- Estimated tax paid
- Gambling or lottery winnings (W-2G)
- Unemployment compensation (1099-G)
- Miscellaneous income (1099-MISC)

## Sole Proprietor / Single Member LLC / Self-Employed / Independent Contractor

- Bank statements
- Receipts and invoices
- Profit and loss statement
- Mileage logs
- Utility bills
- Asset purchase documentation
- Credit card statements
- Sales records
- Merchant account statements

## Supporting Documentation for Deductions / Adjustments

- Medical expenses
- Mortgage Interest (1098)
- Charitable contributions
- Gambling losses
- Student loan interest
- Educator expenses
- Traditional IRA contributions
- Moving expenses

## Tax Credits

- Childcare provider, address, and EIN or Social Security Number (SSN)

- Adoption expenses
- Retirement saving contributions

Note that this list is not exhaustive. If you have questions about other forms of acceptable documentation, please contact us using the contact information above.