

Personal Documents:

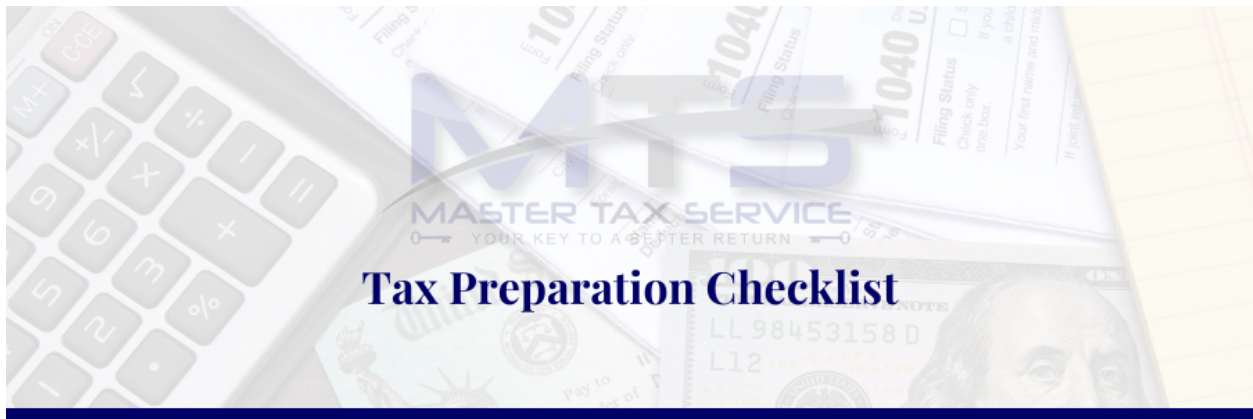
- Photo of Driver's License (cannot be expired)
- Photo of Social Security Card (no exceptions)
- Photo of Spouse's Driver's License (cannot be expired)
- Photo of Spouse's Social Security Card (no exceptions)
- Proof for any Dependents (SSC, Birth Certificate, School Records, and/or Court Documents)
- Utility Bill (if claiming HOH)
- Copy of Last Year's Tax Return (if you are a new client)**

Income Documents:

- W-2
- 1099-Misc
- 1099-NEC
- 1099-K
- 1099-INT
- 1099-DIV
- Any other 1099 Series)

Investment & Retirement Account Documents:

- 1099-DIV
- 1099-INT
- 1099-B
- 1099-OID
- Any other Investment or Retirement Statement



Rental Property Documents:

- Rental Property Income Statement (if available)
- Rental Property Balance Sheet (if available)
- Rental Property Income/Expense Spreadsheet if Financials aren't available (also listed as Business Income and Expense Spreadsheet and it is included in email)

Business Documents (SP, LLC, S-Corp, C-Corp, Partnership, LLP, Non-Profit, Trust, Estate):

- Profit & Loss or Income Statement (if available)
- Balance Sheet (if available)
- Income/Expense Spreadsheet if Financials aren't available (check email for this spreadsheet)
- Schedule C Affidavit (if Financials are not available)
- 1099s (if available)

Education Expense Documents:

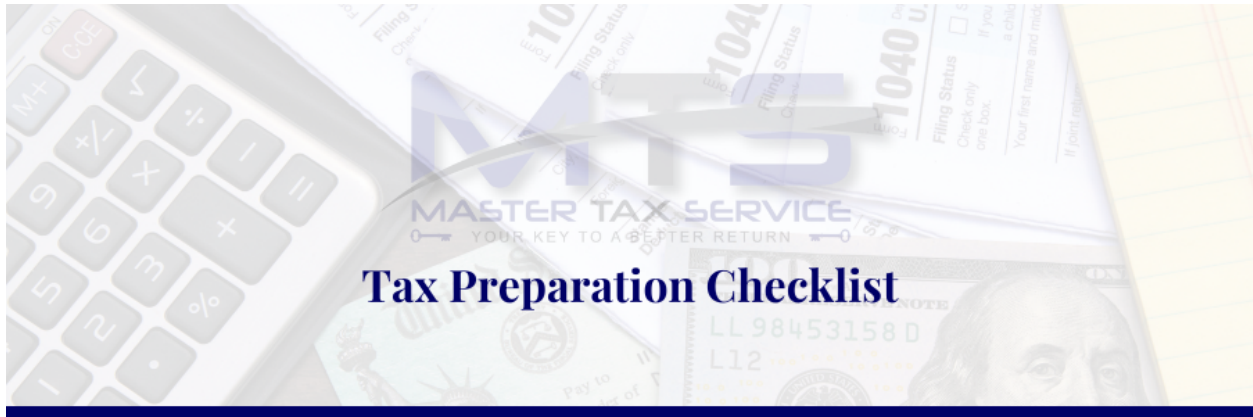
- Form 1098-T for Tuition paid
- Receipts of all other educational expenses paid

Healthcare & Insurance Documents:

- Form 1095-A
- Form 1095-B
- Form 1095-C
- Receipts of any out-of-pocket expenses, bills, or prescriptions

Home Ownership Documents:

- Form 1098- Mortgage Interest Statement
- Property Tax Records (if taxes aren't listed on 1098)
- Any additional documents such as receipts for Solar Tax Credit



Child & Dependent Care Documents:

- Child or Dependent Care Statement (including the provider's name, address, Tax ID number, and total amount paid)

Charitable Donation Documents:

- Receipts/Ack Letters from Charitable Organizations
- Records of Non-Cash Donations

Other Deduction Documents:

- 1098-E (Student Loan Interest Paid)
- Mileage Logs
- Depreciation Schedules/ List of Assets
- Moving Expenses (Military Only)
- Living Expenses for Taxpayers residing overseas
- Any other Tax related documents for the year

If you have any questions about
your Tax Documents, please send
an email to
info@mastertaxservice.co

