Your tax appointment, prepared.

Gather what applies to you. Check each item when it is ready; mark anything that does not apply as N/A. Your preparer may request additional records.

Client name: _____ Tax year: _____

01 Identity & household

- ☐ Photo ID for you and your spouse, if filing together.
- ☐ Social Security cards or ITIN documentation, plus birth dates for everyone on the return.
- ☐ Current address, contact details, and any name or household changes.
- ☐ Last year's federal and state returns; IRS or state letters; current IP PINs, if issued.
- ☐ Verified bank routing and account numbers if requesting direct deposit.

02 Income records

- ☐ W-2s from every employer; W-2G for gambling winnings, if applicable.
- ☐ 1099-NEC, 1099-MISC, and 1099-K forms; records of income without a tax form.
- ☐ 1099-INT, 1099-DIV, investment sale statements, and digital asset transaction records.
- ☐ 1099-R, SSA-1099, and 1099-G, if applicable; Schedule K-1s received.

03 Family, education & health

- ☐ Dependent care costs and provider identification; relevant household or custody records.
- ☐ Education forms and expense records, including tuition and student loan interest.
- ☐ Form 1095-A for Marketplace coverage; HSA forms and contribution records.

The details that complete the picture.

Business owners, freelancers, and households with additional records: use the sections below to organize your appointment.

04 Business & self-employment

- [ ] Business income and expense summaries; bank and payment processor statements.
- [ ] Expense receipts, mileage logs, and equipment purchase or sale records.
- [ ] Business identifying information; prior business returns, if applicable.
- [ ] Estimated tax and extension payment confirmations, with dates and amounts.

05 Other records to discuss

- [ ] Mortgage interest, property tax, charitable giving, and medical expense records.
- [ ] Retirement contribution records; rental income and expense summaries, if applicable.
- [ ] Details of major changes: marriage, divorce, a new child, relocation, or a business change.

06 Before your appointment

- [ ] List missing documents and questions for your preparer.
- [ ] Ask Ombsy for the approved secure method to share sensitive documents.
- [ ] Review names, tax year, and totals for accuracy before submitting your records.

Keep your information secure
Do not put Social Security numbers or bank details on this checklist. Avoid ordinary email or text for tax documents; confirm secure delivery with Ombsy.

Questions or missing documents:

Ready for your next step? Book your consultation.

ombsy.com/taxpro/book | ombsy.info@gmail.com

General preparation guide; items depend on your circumstances. Providing a record does not establish eligibility for a deduction or credit.

References: IRS - Gather your documents; Checklist for free tax return preparation. Reviewed October 2, 2026.