

# Langley and Associates LLC

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Date: \_\_\_\_\_

Client Name: \_\_\_\_\_

## Tax Document Checklist

- **General Information Provided**

- Full name of Taxpayer: \_\_\_\_\_
- Full name of Spouse (if applicable): \_\_\_\_\_
- Full name(s) of dependents: \_\_\_\_\_
- Social Security/Tax ID of everyone listed on return: \_\_\_\_\_
- Dates of Birth for everyone listed on return: \_\_\_\_\_
- Copies of Taxpayer & Spouse Driver's License/State ID: \_\_\_\_\_
- Up to date contact information: \_\_\_\_\_
- Current address: \_\_\_\_\_

- **Income**

- Wages (W2) \_\_\_\_\_ Number of W2's: \_\_\_\_\_
- Social Security or Railroad Retirement (SSA1099/ RRB1099) \_\_\_\_\_  
Number of SSA1099's or RRB1099's: \_\_\_\_\_
- Retirement Distributions (1099R) \_\_\_\_\_ Number of 1099R's: \_\_\_\_\_
- Brokerage Accounts (Brokerage Statements) \_\_\_\_\_  
Number of Brokerage Statements: \_\_\_\_\_
- Interest Income (1099INT) \_\_\_\_\_ Number of 1099INT's: \_\_\_\_\_
- Dividend Income (1099DIV) \_\_\_\_\_ Number of 1099DIV's: \_\_\_\_\_

- **Income from Partnerships, S-Corporations, & Trusts (K1)** \_\_\_\_\_  
 Number of K1's: \_\_\_\_\_
- **Tax Refunds or Other Government Payments (1099G):** \_\_\_\_\_  
 Number of 1099G's: \_\_\_\_\_
- **Self Employment/Independent Contractor Income** \_\_\_\_\_
  - **Number of 1099NEC's:** \_\_\_\_\_
  - **Number of associated 1099MISC's:** \_\_\_\_\_
  - **Profit & Loss Report or comparable summary:** \_\_\_\_\_
  - **List of business assets:** \_\_\_\_\_
  - **Home Office:** \_\_\_\_\_
  - **Business Mileage:** \_\_\_\_\_
- **Rental Income** \_\_\_\_\_
  - **Summarized list of income & expenses:** \_\_\_\_\_
  - **Number of associated 1099MISC's:** \_\_\_\_\_
  - **List of rental assets:** \_\_\_\_\_
  - **Closing Statement(s) if new property:** \_\_\_\_\_
- **Gambling Income (W2G and/or Win/Loss statement)** \_\_\_\_\_  
 Number of W2G's: \_\_\_\_\_    Number of Win/Loss statements \_\_\_\_\_
- **Sale of Real Estate (1099S and/or Closing Statement)** \_\_\_\_\_  
 Number of 1099S's: \_\_\_\_\_
- **Canceled Debt (1099C)** \_\_\_\_\_    **Number of 1099C's:** \_\_\_\_\_
- **I received other income forms or have other income not covered by the listed options** \_\_\_\_\_
- **Other Forms & Items**
  - **Child & Dependent Care expenses (receipts or statements)** \_\_\_\_\_

- Higher Education expenses (1098T) \_\_\_\_\_
- Marketplace/Exchange Health Insurance (1095A) \_\_\_\_\_
- HSA Contributions (5498-SA) \_\_\_\_\_
- Retirement Contributions (Form 5498) \_\_\_\_\_
- Student Loan Interest (1098E) \_\_\_\_\_
- Educator expenses (receipts, statements, summaries) \_\_\_\_\_
- Itemized Deductions
  - Summary or worksheet listing deductible expenses \_\_\_\_\_

**Other Notes:** \_\_\_\_\_

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