



## PIERRE THE TAX GUY LLC

### COMPREHENSIVE TAX PREPARATION CHECKLIST

#### Personal Information

■	Taxpayer Social Security Number or Tax ID
■	Spouse full name, SSN / Tax ID, and date of birth (if applicable)
■	IRS Identity Protection PIN (if issued)
■	Bank routing and account numbers for refund or payment
■	Foreign reporting or residency information (if applicable)

#### Dependent Information

■	Dependents' names, dates of birth, and SSNs / Tax IDs
■	Childcare provider name and Tax ID (if applicable)
■	Income of dependents or other adults in household
■	Form 8332 (if applicable)

#### Income – Employment & Other

■	Forms W-2
■	Unemployment income (1099-G)
■	Jury duty records
■	Prizes and awards
■	Hobby income and expenses

## Self-Employed, Rental & Investment Income

■	Forms 1099-NEC, 1099-MISC, Schedules K-1
■	Records of income not reported on 1099s
■	Business expense records and receipts
■	Business asset information for depreciation
■	Home office information (if applicable)
■	Estimated tax payments (Form 1040-ES)
■	Rental income and expense records
■	Rental asset depreciation information

## Retirement, Savings & Other Income

■	Pension, IRA, annuity income (1099-R)
■	Traditional IRA basis records
■	Social Security or Railroad Retirement income (SSA-1099, RRB-1099)
■	Interest and dividends (1099-INT, 1099-OID, 1099-DIV)
■	Stock or property sales (1099-B, 1099-S)
■	Cost basis records for property sold
■	HSA or long-term care distributions (1099-SA, 1099-LTC)
■	Cryptocurrency or digital asset transactions (1099-DA)
■	Payment card / third-party network income (1099-K)
■	Gambling income (W-2G)
■	Trust income

## Deductions & Credits

■	Mortgage interest statements (1098 series)
■	State tax refunds
■	Alimony paid or received records
■	Charitable donations (cash and non-cash)
■	Mileage for charitable or medical purposes
■	Medical and healthcare expenses
■	Health insurance premiums and Form 1095-A
■	Childcare expenses and dependent care FSA records
■	Education expenses (1098-T, scholarships, student loan interest)
■	K-12 educator classroom expenses
■	State and local income or sales taxes paid
■	Vehicle sales or property tax invoices
■	HSA and IRA contribution forms (5498 series)
■	Energy-efficient home improvements
■	Electric vehicle information
■	Royalty income (1099-MISC)

## Federally Declared Disaster Information

■	City/county of residence or property location
■	Property loss documentation and appraisals
■	Repair or rebuilding cost records
■	Insurance reimbursements or pending claims
■	FEMA assistance documentation