

# Tax Document Checklist

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## Jackson Tax Service

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### Personal Information Documents

- Social Security cards for you, spouse, and dependents
- Driver's license or government-issued ID
- Bank account information for direct deposit
- Prior year tax return (if available)

### Income Documents

- W-2 forms from all employers
- 1099-MISC forms (freelance/contract work)
- 1099-INT forms (interest income)
- 1099-DIV forms (dividend income)
- 1099-R forms (retirement distributions)
- 1099-G forms (unemployment compensation)
- 1099-K forms (payment card transactions)
- K-1 forms (partnership/S-corp income)
- Rental property income records
- Business income records (if self-employed)

### Deduction Documents

#### Medical Expenses

- Medical and dental expense receipts

- Health insurance premiums paid
- Prescription medication receipts
- Long-term care insurance premiums

### **Homeownership**

- Mortgage interest statement (Form 1098)
- Property tax receipts
- Home improvement receipts (for capital gains)
- Home office expenses (if applicable)

### **Education**

- 1098-T forms (tuition payments)
- 1098-E forms (student loan interest)
- Education expense receipts

### **Charitable Contributions**

- Donation receipts from qualified charities
- Non-cash donation records
- Mileage logs for charity work

### **Business Expenses (Self-Employed)**

- Office supplies and equipment
- Vehicle mileage log
- Business insurance premiums
- Professional dues and subscriptions
- Advertising and marketing expenses
- Business meal receipts
- Travel and lodging receipts
- Home office expenses

## Investment Documents

- 1099-B forms (stock sales)
- Cryptocurrency transaction records
- Investment expense records
- Records of estimated tax payments

## Retirement Contributions

- IRA contribution records
- 401(k) contribution statements
- HSA contribution records
- SEP-IRA or SIMPLE IRA contributions

## Other Important Documents

- Childcare provider information (name, address, tax ID)
- Adoption expenses
- Alimony paid or received
- Gambling winnings and losses
- State and local tax refunds from prior year
- Energy-efficient home improvement credits

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## Tips for Tax Preparation

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- 1. Organize Early:** Don't wait until the last minute. Start gathering documents in January.
- 2. Keep Digital Copies:** Scan or photograph all documents for backup.
- 3. Track Throughout the Year:** Keep receipts and records organized year-round, not just at tax time.

4. **Ask Questions:** If you' re unsure whether something is deductible, bring it anyway. We' ll help you determine eligibility.

5. **Report All Income:** Even if you didn' t receive a 1099, you must report all income.

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## Ready to File?

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Contact Jackson Tax Service to schedule your appointment:

**Phone:** 313-427-4856

**Email:** [ajackstaxservice@gmail.com](mailto:ajackstaxservice@gmail.com)

**Address:** 1938 Burdette, Ferndale, MI 48220

**Hours:** Monday-Friday 4:00 PM - 8:00 PM

**Services Available Nationwide** - Virtual appointments available!

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