

Guardian Tax Services LLC

Tax Information Checklist

To assist us in finding every allowable deduction and credit you are entitled to, use the following list to help you organize your tax documents and information. Then send or bring them to us, along with your completed Tax Questionnaire.

- ☐ Driver's License(s)
- ☐ Social Security Card(s)
- ☐ Dependent's Social Security Card(s) and Dates of Birth
- ☐ Form W-2 (Wage Statements)
- ☐ Form 1099-MISC (Miscellaneous Income)
- ☐ Form 1099-NEC (Nonemployee Compensation)
- ☐ Form 1099-R (Pension and Retirement Income)
- ☐ Form 1099-INT (Interest Income)
- ☐ Form 1099-DIV (Dividend Income)
- ☐ Form 1099-G (State Income Tax Refund)
- ☐ Form 1099 G (Unemployment Income)
- ☐ Form 1099-B (Sales of Stocks or Bonds) {Include dates and purchase price and sale price of stocks and bonds} ☐
- ☐ Form SSA-1099 (Social Security Income)
- ☐ Form W-2G (Lottery or Gambling Winnings)
- ☐ Schedule K-1 (Income from Partnerships, S Corporations, Trusts, and Estates)
- ☐ Income and Expenses from Rentals
- ☐ Alimony Paid or Received
- ☐ Commissions Received
- ☐ Commissions Paid
- ☐ Lottery or Gambling Losses
- ☐ IRA Contributions
- ☐ Form 1098 (Mortgage or Home Equity Loan Interest Paid)
- ☐ Real Estate and Personal Property Taxes Paid
- ☐ Record of Purchase or Sale of Real Residence
- ☐ Child Care Expenses and Provider Information
- ☐ Medical, Eye Care, and Dental Expenses
- ☐ Cash and Non-cash Charitable Donations
- ☐ Form 1098-T (Tuition and Education Fees)
- ☐ Form 1099-E (Student Loan Interest)
- ☐ Educator Expenses (For Teachers)
- ☐ Estimated Taxes Paid
- ☐ Foreign Taxes Paid
- ☐ Copy of Last Year's Federal and State Tax Return (If available)