

Careful Counting

Documents Needed To File Taxes

For Individual Tax Filings (1040)

Personal Information:

- Valid ID (driver's license or state ID)
- Social Security Numbers (for you, spouse, and dependents)
- Bank account and routing numbers for direct deposit

Income Documents:

- W-2s (from all employers)
- 1099 forms (e.g., 1099-NEC, 1099-MISC, 1099-K, 1099-INT, 1099-DIV, etc.)
- Alimony received, unemployment, or other income statements

Deductions and Credits:

- Medical expenses, mortgage interest (Form 1098), property tax statements
- Education expenses (Form 1098-T), student loan interest (Form 1098-E)
- Charitable donations receipts
- Child Care provider information (name, address, and EIN/SSN)

For Single-Member LLCs (Schedule C)

Personal Information:

- Social Security Number or EIN

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Income Documents:

- All 1099-NEC, 1099-K, or other income reports
- Business income records (e.g., invoices, sales reports)

Expense Documentation:

- Business Profit & Loss Statement
- Receipts for business expenses (e.g., office supplies, software, marketing)
- Vehicle expenses (mileage log or actual expenses)
- Home office expenses (utilities, rent, square footage details)

For Multi-Member LLCs (Form 1065)

Company Information:

- EIN, business formation documents, operating agreement

Income Documents:

- 1099s issued to the LLC, total gross receipts/income

Expense Documentation:

- Business expenses (categorized: rent, utilities, payroll, etc.)
- K-1 information for all partners
- Other Documents:
- Prior year tax return (if applicable)

For S-Corporations (Form 1120S)

Company Information:

- EIN, articles of incorporation, S-Corp election acceptance letter (Form 2553)

Income Documents:

- 1099-K, 1099-NEC, or other business income reports

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- Sales records and total gross receipts
- Expense Documentation:
- Payroll records, rent/mortgage payments, office supplies
- Vehicle and travel expenses

Other Documents:

- Shareholder details (name, SSN, percentage ownership)
- Prior year tax return

For C-Corporations (Form 1120)

Company Information:

- EIN, articles of incorporation

Income Documents:

- Business income reports (e.g., sales records, 1099-Ks)

Expense Documentation:

- Business operating expenses (categorized: payroll, marketing, rent, etc.)

Other Documents:

- List of shareholders and their ownership percentage
- Prior year tax return

For Nonprofits (Form 990)

Organization Information:

- EIN, articles of incorporation, IRS determination letter

Income and Expenses:

- Donation records, grant income
- Expense records (program costs, administrative expenses)

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Other Documents:

- Board member names and contact information
- Prior year tax return (if applicable)

General Tips for All Filings

- Organize documents by category (income, expenses, deductions).
- Provide prior year tax returns if you're a new client if needed
- Ensure all documents are legible and complete.

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