TP CREDIT & TAX SOLUTIONS

TAX SEASON READINESS CHECKLIST

1. PERSONAL INFORMATION (REQUIRED FOR FILING)

- Full legal name
- Social Security Number (SSN) or ITIN
- Date of birth
- Current address
- Phone number + email
- Bank account + routing number (for direct deposit)
- Driver's license or state ID

3. EXPENSES & DEDUCTION DOCUMENTS

Standard Items

- Medical expenses
- Dental/vision expenses
- Prescription receipts
- Health insurance premiums (1095-A, B, or C)
- Childcare expenses + provider info
- Education expenses (Form 1098-T)

Home-Related

- Mortgage interest (Form 1098)
- Property taxes
- Home office expenses (if self-employed)
- Rent statements (some states give credits)

Business-Related (Self-Employed)

- Mileage log
- Gas receipts
- Supplies
- Advertising/marketing
- Phone/internet percentage
- Tools/equipment
- Contractor payments

2. INCOME DOCUMENTS

W-2 Employees

- All W-2s from each employer

Self-Employed / 1099 Workers

- All 1099-NEC or 1099-MISC
- Income log (Cash App, Zelle, PayPal, Stripe, Venmo, etc.)
- Profit & loss summary (P&L)
- Receipts for business expenses

Other Income

- 1099-K (third-party sales platforms)
- 1099-DIV (dividends)
- 1099-B (investments)
- 1099-R (retirement distributions)
- 1099-G (unemployment, state refunds)
- Social Security benefits (SSA-1099)
- Rental income statements
- Alimony received (if applicable)

4. DEPENDENTS

- Full name(s) of dependents
- SSN for each dependent
- Birth certificates (for verification, if needed)
- Proof of residency (school letter, medical letter, etc.)
- Childcare provider EIN + address
- Custody agreements (if split households)

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5. CREDITS YOU MAY QUALIFY FOR

- Earned Income Credit (EIC)
- Child Tax Credit
- American Opportunity Credit
- Lifetime Learning Credit
- Child & Dependent Care Credit
- Savers Credit
- Energy Efficiency / EV Credits
- Premium Tax Credit (health insurance marketplace)

6. ADDITIONAL DOCUMENTS

- Last year's tax return
- IRS letters/notices
- Bank statements
- Student loan interest (Form 1098-E)
- Charitable donation receipts
- Crypto transaction log (if applicable)
- Adoption documents
- Real estate documents (purchase, sale, refinance)

7. SELF-EMPLOYED / SMALL BUSINESS CHECKLIST

- Business license
- EIN
- Business bank statements
- Receipts & proof of purchases
- Inventory records
- Quarterly tax payments (if you paid any)
- Bookkeeping summary
- Contractor 1099s you issued

8. BEFORE YOU FILE

- Verify name + SSN are correct on all documents
- Compare numbers across all forms
- Confirm dependent eligibility
- Review income totals
- Double-check deductions
- Ensure direct deposit details are accurate
- Ask for a tax refund estimate (if applicable)

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Ready to File Your Taxes?

We can help you file fast, accurately, and maximize your refund.

JOIN OUR TAX WAITLIST

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