Your Tax-Time Checklist

For new and returning clients. Check only what applies; your preparer may request additional records.

Name and tax year - no SSN here

Identity and household records

- ☐ Photo ID; SSN / ITIN records for everyone on the return
- ☐ Current-year IP PIN letters for anyone issued an IP PIN
- ☐ Prior-year federal / state returns, if available
- ☐ Household changes, dependent residency and support records
- ☐ Direct deposit details - provide through the secure portal

Income records

- ☐ W-2s; contractor / gig forms and cash-income records
- ☐ Interest, dividends, investments and digital-asset transactions
- ☐ Retirement, Social Security and unemployment statements
- ☐ Rental, partnership / S corporation, or other income records

Bring all applicable forms, including corrected versions. A missing tax form does not automatically mean the income is excluded.

Credits, Deductions & Business

Gather supporting documents. Having an expense does not automatically make you eligible for a tax benefit.

If these apply to you

- ☐ Marketplace health coverage: Form 1095-A
- ☐ Childcare payments and provider identification details
- ☐ Education forms and tuition / eligible expense records
- ☐ Mortgage interest, property tax and charitable-giving records
- ☐ Medical, HSA and retirement contribution records
- ☐ IRS / state notices and estimated tax-payment confirmations

For self-employed clients

- ☐ Business income summary, invoices and payment-platform reports
- ☐ Expense summary, itemized receipts and bank / card statements
- ☐ Mileage / travel logs and documented business-use portions
- ☐ Inventory, equipment, purchase / lease and loan paperwork

Use the Beautypreneur, Truck Driver or general 1099 workbook to organize your records. Confirm with Klarity which records are needed for your situation.

Your Final Check-In

A little preparation makes your appointment easier.

- ☐ I gathered records for every job, business and income source
- ☐ I identified missing or corrected forms
- ☐ I noted life changes and questions for my preparer
- ☐ I kept original records and a secure backup
- ☐ I will use Klarity's approved secure method to send sensitive documents

What is still missing?

Document / question	Who to contact	Requested / received

Contact Klarity

903-559-4734
klarityfinancialgroupllc.com
Please request secure submission instructions before sending identification, tax documents or banking information.

This checklist is an organizer, not a complete eligibility determination. Requirements vary with your return and applicable tax-year rules.

IRS source: irs.gov/filing/gather-your-documents
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