

Your Tax Preparation Checklist

A helpful starting point for your appointment. Your needs depend on your circumstances and the tax year.

1. Identification & basic information

- Photo identification for taxpayers
- Names, dates of birth, and current mailing address for you and dependents
- Prior-year tax return, if available
- Any IRS or Ohio tax notices you would like to discuss

2. Income documents

- W-2 forms from employers
- 1099 forms for interest, dividends, retirement, unemployment, or other income
- 1099-NEC, 1099-K, or other records for contract, gig, or self-employment income
- Records of other income, including relevant digital-asset transactions

3. Self-employment & business records

- Income summaries, invoices, and payment processor statements
- Receipts, invoices, and summaries of business expenses
- Business mileage or travel records, with dates and business purpose where relevant
- Records for equipment or other major asset purchases
- Prior estimated tax payment records, if applicable

4. Potential deductions & credits

- Records for charitable contributions, if applicable
- Education, childcare, or dependent-care documents, if applicable
- Health coverage or retirement contribution documents, if applicable
- Home or property information that may affect your return

5. Questions to discuss

- Changes in your household, work, or business
- More than one W-2 or 1099, or a form you think is missing
- Self-employment income and whether estimated payments may apply
- Questions about deductions, credits, or planning for the coming year

Privacy reminder: Please do not email Social Security numbers, complete tax returns, bank account information, or other sensitive financial details through the website contact form. Ask Brandon about an appropriate way to share tax documents.

General guidance only, not an exhaustive list or tax advice. Requirements vary by taxpayer and year. BMW Tax Services provides personal and small business tax preparation in association with Paul S. Alex P.A.

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