



Tax-Time Document Checklist

Everything to gather before you file — so tax season is calm, not chaotic.

Tick off what applies to you, then bring it to your appointment. Not every line fits every person — gather what you have, and Michael will help with the rest on your free consultation.

Everyone

[START HERE](#)

- ☐ **Photo ID & Social Security cards**
For you, your spouse, and every dependent
- ☐ **Last year's tax return**
Federal (and state, if you filed one)
- ☐ **All W-2 forms**
One from each employer you worked for
- ☐ **Bank routing & account number**
For direct-deposit of any refund
- ☐ **Any IRS or state letters**
Notices received during the year

Other income

- ☐ **1099-NEC / 1099-MISC**
Freelance, contract, or side work
- ☐ **1099-K**
Payment apps & card sales (Venmo, Cash App, etc.)
- ☐ **1099-INT / 1099-DIV**
Interest & investment income
- ☐ **1099-G**
Unemployment benefits
- ☐ **SSA-1099 / 1099-R**
Social Security & retirement income

Deductions & credits

- ☐ **1098 mortgage interest & property tax**
If you own your home
- ☐ **Childcare costs & provider info**
Amount paid plus the provider's name & tax ID
- ☐ **1098-T / 1098-E**
Tuition paid & student-loan interest
- ☐ **Charitable donation receipts**
Cash and non-cash giving
- ☐ **Retirement contributions**
IRA or HSA amounts paid in

Small business & self-employed

[IF IT'S YOU](#)

- ☐ **Income records**
Invoices, sales totals, and all 1099s received
- ☐ **Expense records by category**
Supplies, rent, utilities, software, fees
- ☐ **Mileage log & vehicle costs**
Business miles driven during the year
- ☐ **Home-office details**
Square footage used only for business
- ☐ **Estimated tax payments made**
Dates and amounts you paid quarterly
- ☐ **Equipment & asset purchases**
Receipts for anything large you bought
- ☐ **EIN & formation documents**
If you set up an LLC or corporation
- ☐ **Payroll records**
If you have employees or contractors

Not sure about a line? Bring this to your free 30-minute consultation — Michael will walk you through it.

Call or text (915) 603-2240

Email mamtaxandfinance@gmail.com

Office 7001 Westwind Dr., Ste 114, El Paso, TX 79912

This checklist is general information only and is not tax, legal, or accounting advice. Your situation may need more or fewer documents. © 2026 MAM Accounting, Tax & Financial Services. All rights reserved.