RLS Tax Document Checklist

To ensure a smooth and efficient tax preparation process, please gather and provide the following documents:

Income Documents:

- W-2 forms from all employers.
- 1099 forms (e.g., 1099-NEC for self-employment income, 1099-DIV for dividends, 1099-INT for interest income, 1099-R for retirement income).
- Unemployment income statements (Form 1099-G).
- Social Security benefits statement (SSA-1099).
- Alimony received (if applicable).
- Any other income documentation (e.g., rental income, scholarships).

Deductions and Credits:

- Mortgage interest statement (Form 1098).
- Property tax records.
- Medical and dental expense records.
- Childcare expenses, including provider’s name, address, and tax ID.
- Education expenses (Form 1098-T, tuition, and fees).
- Records of charitable donations (cash and non-cash).
- Business expenses (receipts and records for self-employed individuals).

Other Relevant Documents:

- Form 1095-A, 1095-B, or 1095-C (proof of health insurance coverage).
- Any notices or letters from the IRS.
- Bank account and routing numbers for direct deposit/refund.

Additional Documents for Specific Situations:

- Rental property income and expenses.
- Investment income (stock transactions, capital gains/losses).
- Retirement contributions (e.g., IRA contributions).
- Records of estimated tax payments made.

Please ensure all documents are accurate and legible. If you have any questions or need assistance gathering these materials, don’t hesitate to contact us at **757-240-4301** or via email at **rlsproserv@gmail.com**.

Thank you for choosing RLS Professional Services!