What to Send: Individuals

Your tax document checklist from Landers Accounting & Tax Service

Gather what applies to you, then upload everything securely through the client portal. If you are not sure whether something counts, send it anyway and note it for the office.

Identification and basics

- ☐ Photo ID for you, and for your spouse if you file jointly
- ☐ Social Security cards or ITIN letters for everyone on the return
- ☐ Last year's tax return, if you are a new client
- ☐ Bank account and routing numbers for direct deposit
- ☐ Any letters from the IRS or the state, including an Identity Protection PIN letter if you received one

Income

- ☐ W-2 from every employer
- ☐ 1099-NEC or 1099-MISC for contract or freelance work
- ☐ 1099-INT and 1099-DIV for interest and dividends
- ☐ Brokerage statements and 1099-B for stocks, funds, or crypto sales
- ☐ SSA-1099 for Social Security benefits
- ☐ 1099-R for pensions, annuities, or IRA withdrawals
- ☐ 1099-G for unemployment benefits
- ☐ Schedule K-1 forms from any partnership, S corporation, or estate
- ☐ Rental income and a summary of rental expenses, if you own rental property

Deductions and credits

- ☐ Form 1098 for mortgage interest, plus property tax records
- ☐ Charitable giving receipts, cash and noncash
- ☐ Medical and dental expenses, if they were significant
- ☐ Form 1098-E for student loan interest
- ☐ Form 1098-T and education expenses for students
- ☐ Childcare expenses, with the provider's name, address, and tax ID
- ☐ HSA and IRA contribution records
- ☐ Receipts for energy improvements or a clean vehicle purchase, if you made one

Life changes and payments

- ☐ Closing disclosure if you bought or sold a home
- ☐ Records of estimated tax payments you made, with dates and amounts
- ☐ A note about life changes: marriage, divorce, a new child, or a new job

Questions about a document? Call 770-627-5255 or send the office a message through the client portal.