Ellison & Associates Tax Service LLC

Professional • Accurate • Client-Focused
Serving Metro-Atlanta & Remote Clients Nationwide

CLIENT TAX SEASON CHECKLIST (FULL)

This checklist is designed as a general checklist to guide you in collecting all your tax documents and to ensure a smooth, accurate, and complete tax filing process. Use our Customer Portal or Taxes2Go to upload all applicable documents to the client portal.

Personal Information

- ☐ Government-issued photo ID (taxpayer and spouse)
- ☐ Social Security cards or ITIN letters (all household members)
- ☐ Dates of birth for all dependents
- ☐ Prior-year federal and state tax returns
- ☐ Current address, phone number, and email
- ☐ Bank routing and account numbers (refund or payment)

Income Documentation

- ☐ W-2s (all employers)
- ☐ 1099-NEC / 1099-MISC / 1099-K
- ☐ 1099-INT / 1099-DIV / 1099-B
- ☐ 1099-R (retirement income)
- ☐ SSA-1099 (Social Security)
- ☐ Unemployment income
- ☐ Rental or other miscellaneous income

Self-Employed / Business (If Applicable)

- ☐ Profit & Loss statement
- ☐ Expense summaries or receipts
- ☐ Mileage log
- ☐ Home office details
- ☐ Estimated tax payments
- ☐ EIN confirmation

🏠 Deductions & Credits

- ☐ Mortgage interest (1098)
- ☐ Property taxes
- ☐ Education forms (1098-T, 1098-E)
- ☐ Childcare expenses & provider info
- ☐ Health insurance forms (1095-A/B/C)
- ☐ HSA/FSA forms
- ☐ Charitable donation records

💰 Notices & Payments

- ☐ IRS or state correspondence
- ☐ Prior-year balance due confirmations
