



## Personal Tax Preparation Checklist\*

- All income forms (W-2, 1099, 1099-G for state unemployment benefits, alimony, pensions, Social Security, gambling, etc.)
- Copy of your driver's license (if renewed in the last 12 months)
- Payments/deductions for student loan interest, qualified college expenses, state & local taxes, HSA and IRA contributions, etc.
- Health insurance form 1095-A if using healthcare.gov.; amount of premiums paid from any other source.
- Estimated tax payment records (forms 1040-ES, 500-ES) with proof of payment.
- Annual statements from all retirement accounts, brokerage accounts, annuities, etc.
- Income for any children or dependents (Note: this may need to be reported on a separate return).
- IRA withdrawals/proof of rollovers to a new account or Roth IRA, if used for qualified charitable donations, or return of RMD due to CARES act changes.
- Sales or purchases of real estate (closing documents on purchase or sale, plus receipts for any upgrades; if primary home for at least 2 years, only need closing documents on sale).
- Signed engagement letter sent to you by us. Note: we cannot begin working on your return until this is signed.
- Completed short-form organizer. A link to this form will be sent to you after signing your engagement letter. Note that this form must also be completed before we can begin work on your return.

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*\*This list is not exhaustive. We may request additional documents after we begin preparation of your return. All documents should be uploaded to our portal at <https://sbspremier.clientportal.com/> If you need help logging in, please email us below.*

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