# Tax Preparation Checklist

**Purpose:** This checklist is designed to help individuals and businesses gather all necessary documentation and information required to prepare and file their taxes accurately and efficiently.

## Contact Information

* **Name:** {fullName}
* **Email:** {email}
* **Phone Number:** {phoneNumber}

## Basic Personal Information

* **Social Security Number:** {ssn}
* **Filing Status:** {filingStatus}
* **Occupation:** {occupation}

## Dependents

{#dependents}

* **Name:** {name}, **SSN:** {ssn}, **Date of Birth:** {dob}, **Relationship:** {relationship}

{/dependents}

## Income Documents

Please gather the following applicable income documents:

{#incomeDocuments}

* {description}

{/incomeDocuments}

## Deductions & Credits

Check all that apply and make sure to provide documentation:

{#deductions}

* {deductionName}

{/deductions}

## Business Income & Expenses

{#hasBusiness}

**You have indicated that you own or operate a business. Please provide the following:**

* Income records (e.g. bank statements, invoices)
* Expense receipts (supplies, rent, advertising, etc.)
* Vehicle mileage and expenses
* 1099 Forms from clients

{/hasBusiness}

{^hasBusiness}

No business income was reported.

{/hasBusiness}

## Other Financial Information

* Bank account and routing numbers for direct deposit: {bankDetails}
* Estimated tax payments made: {estimatedPayments}
* Foreign accounts/assets information: {foreignAssets}

## Uploaded Tax Documents

|  |  |  |
| --- | --- | --- |
| **Document Name** | **Type** | **Year** |
| {#documents}{fileName} | {fileType} | {taxYear}{/documents} |

## Notes or Special Instructions

{notes}

**Reminder:** Double-check each section and confirm that all necessary fields are completed and documents attached before submission to your tax preparer or filing.