



Providing Virtual Tax and Small Business
Solutions with concierge level care.

Personal Tax Filing Checklist

Provide the following documents and information to ensure accurate and timely preparation of your personal tax return.

Upload all relevant tax documents to your existing portal account or go to our website to sign up for a portal account.

Personal Information

- Full name, Social Security Number (SSN), and date of birth for yourself, your spouse, and any dependents.
- A copy of last year's tax return (if not already with the tax preparer).
- Bank account details (routing and account numbers) for direct deposit of any refund.

Income Documents

- **Employment Income:** W-2 forms from all employers.
- **Self-Employment Income:**
 - 1099-NEC, 1099-K, or any other income documentation.
 - Detailed record of business income and expenses.
- **Investment Income:**
 - 1099-INT (interest income).
 - 1099-DIV (dividends).
 - 1099-B (sale of investments, including cost basis).
- **Retirement Income:** 1099-R or SSA-1099 for Social Security benefits.
- **Other Income:**
 - 1099-G (unemployment or state tax refunds).
 - Alimony received (if applicable).

- Rental income records.

Deductions and Credits

- **Education Expenses:**
 - Form 1098-T for tuition.
 - Records of student loan interest (Form 1098-E).
- **Medical Expenses:**
 - Out-of-pocket medical, dental, or vision expenses.
 - Health insurance premiums (including Marketplace forms, Form 1095-A).
- **Charitable Donations:** Receipts for cash or non-cash donations.
- **Childcare Expenses:** Provider's name, address, SSN/EIN, and amount paid.
- **Mortgage or Real Estate Taxes:**
 - Form 1098 (mortgage interest).
 - Property tax payment records.
- **Other Deductions:**
 - IRA contributions.
 - Job-related expenses (if eligible under current tax law).

Miscellaneous

- Records of estimated tax payments made during the year.
- Details of any stimulus payments or advanced child tax credit received.
- Any correspondence from the IRS or state tax agency.

Providing these documents will help streamline the process and minimize delays in preparing your personal tax return.

Contact Us Today

Jet Tax Service Corp

Jet Tax Business Services Corp

O: 954-667-0855

C: 786-369-9058

E: Info@JetTaxServiceCorp.com

W: www.JetTaxServiceCorp.com