

# **Tax Client Onboarding Checklist**

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## **Required Documents for Tax Preparation**

- Photo ID (Driver's license or state-issued ID)
- Social Security cards or ITIN documentation for all individuals listed on the return
- Last year's tax return (if available)
- W-2 forms from all employers
- 1099 forms (NEC, MISC, INT, DIV, K, etc.)
- Unemployment income statements (1099-G)
- SSA-1099 for Social Security benefits
- Brokerage or investment statements
- Bank interest or dividend income

## **Self-Employed / Small Business Clients**

- Income and expense summary by year
- 1099-NEC forms received
- Mileage log or total business miles driven
- Receipts for major purchases or fixed assets
- Home office details (square footage, utility bills, rent/mortgage)

## **Credits and Deductions**

- Childcare expenses (with provider info and EIN/SSN)
- Education expenses (1098-T, tuition receipts)
- Medical expenses (if itemizing)
- Charitable donations (cash and non-cash)
- Mortgage interest and property tax (Form 1098)

## **Other Helpful Info**

- Estimated tax payments made during the year
- Any IRS letters or tax notices received
- Bank account info for direct deposit/refund