

Filing Taxes

COMMON DOCUMENTS CHECKLIST

FOR YOUR BUSINESS

- Profit and Loss Statement (for businesses)
 - Income / Revenue
 - Expenses / Deductions / Write-offs
- Balance Sheet (for businesses)
- Income if contractor (1099s)

If you need any resources to help you gather or compile your documents, send us an email:
info@incitetax.com

FOR YOUR PERSONAL

- Wages/Salaries/Tips (W-2s)
- Interest Income (1099-INT)
- Student Loan Interest (1098-E)
- Dividend Income (1099-DIV)
- Partner/Shareholder Share of Income (Sch K-1)
- Social Security Income (SSA-1099)
- Cancellation of Debt (1099-C)
- State Tax Refund/Unemployment (1099-G)
- Stock Sales (1099-B)
- HSA Distributions (1099-SA)
- HSA Contributions (5498-SA)
- Pensions/IRAs (1099-R)
- IRA Contributions (5498)
- SEP/Simple Contributions
- Health Insurance Premiums (if self-employed)
- Health Insurance (if Marketplace, 1095-A, B or C)
- Vehicle Registration
- Property Tax (if not provided on 1098)
- Mortgage Interest Statement (1098)
- Tuition Paid (1098-T)
- Taxable Scholarships/Fellowships
- HUD Statements/Closing Disclosure (buy/sell/refi)
- Charitable Contributions/Noncash Donations
- Tax preparation fees



info@incitetax.com
801-999-8295
www.incitetax.com

Save more on taxes!

#IRSSUCKS