

Individual Tax-Prep Checklist

Everything to gather before your appointment

A little prep makes tax time painless. Use this checklist to round up your documents so nothing gets missed and your refund isn't delayed. Not sure whether something belongs? Bring it anyway — we'd rather have it and not need it.

Personal & household info

- Photo ID for you (and your spouse, if filing jointly)
- Social Security numbers or ITINs for everyone on the return
- Bank routing & account number for direct deposit
- Last year's tax return (if this is your first year with us)

Income documents

- W-2s from each employer
- 1099-NEC / 1099-K for self-employment, gig, or freelance work
- 1099-INT and 1099-DIV for interest & dividends
- 1099-G for unemployment or state refunds
- 1099-R for retirement, pension, or IRA distributions
- SSA-1099 for Social Security benefits
- K-1s from any partnership, S-corp, estate, or trust
- Records of any other income — rental, alimony, prizes, or gambling

Deductions & credits

- 1098 mortgage interest and property-tax records
- Charitable donation receipts (cash and non-cash)
- Total out-of-pocket medical & dental expenses
- 1098-T tuition statements and 1098-E student-loan interest
- Childcare provider's name, address, EIN, and amount paid
- IRA, HSA, or retirement contribution records
- Receipts for energy-efficient home improvements

Did any of these happen this year?

- Got married or divorced
- Had or adopted a child

- Bought or sold a home
- Started, bought, or closed a business
- Moved to or from another state
- A major medical event
- First responder or military? Bring proof of service – ask about your 10% discount

FROM ALL OF US AT EIB SYSTEMS

Bring what you've got and we'll handle the rest. If you're missing something, don't sweat it – we'll help you track it down.

Questions? Call (205) 854-1957 or email info@eiboffice.com. Your first conversation is always free.

This guide is general information from EIB Systems, not tax or legal advice for your specific situation. Tax rules change and every situation is different – let's talk about what applies to you.