ANCHOR
TAX SOLUTIONS

Client Tax Preparation Checklist
Client-facing | Tax year 2026 returns filed in 2027
Please prepare only the items that apply to your situation.
Your preparer may request additional records.

PERSONAL INFORMATION

- ☐ *Government-issued photo ID for taxpayer and spouse, if applicable*
- ☐ *SSNs or ITINs for everyone on the return (provide securely)*
- ☐ *Dates of birth for taxpayer, spouse and dependents*
- ☐ *Current mailing address, phone and email*
- ☐ *Prior-year federal and state returns, if available*
- ☐ *Bank account and routing information for refund or payment (provide securely)*

DEPENDENTS & FAMILY

- ☐ *Dependent names, relationship and months living with you*
- ☐ *Childcare provider name, address, tax ID and amounts paid*
- ☐ *Form 8332 or other dependency documentation, if applicable*
- ☐ *Residency or support records if requested*
- ☐ *Form 1098-T for eligible students*

INCOME

- ☐ *All W-2s*
- ☐ *Forms 1099-NEC, 1099-MISC and 1099-K, as applicable*
- ☐ *Forms 1099-INT, 1099-DIV and 1099-R*
- ☐ *SSA-1099 and 1099-G, if applicable*
- ☐ *Investment and digital asset transaction records*
- ☐ *Rental income records*
- ☐ *Other income records even without a tax form*

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SELF-EMPLOYMENT / 1099 WORK

- [ ] *Business income and sales records*
- [ ] *Expense records and receipts*
- [ ] *Business mileage log, including total and business miles*
- [ ] *Vehicle purchase or lease information*
- [ ] *Home office expenses, if applicable*
- [ ] *Equipment purchases and contractor payment records*
- [ ] *Business insurance, licensing and estimated tax payments*

DEDUCTIONS & CREDITS

- [ ] *Mortgage interest Form 1098 and property taxes*
- [ ] *Charitable donations and eligible medical expenses*
- [ ] *Student loan interest Form 1098-E*
- [ ] *Retirement contribution records*
- [ ] *HSA Forms 1099-SA and 5498-SA*
- [ ] *Energy improvement documentation, if applicable*
- [ ] *Marketplace Form 1095-A, if applicable*
- [ ] *Education, adoption and childcare expenses*

OTHER ITEMS

- [ ] *IRS or state notices*
- [ ] *IRS Identity Protection PIN (IP PIN), if issued*
- [ ] *Estimated tax payment records*
- [ ] *Details of marriage, divorce, moves or dependent changes*
- [ ] *Completed intake questionnaire and questions for your preparer*

SECURITY: Upload sensitive documents through the designated secure tax portal. Do not send SSNs or tax records through ordinary email, text or social media.