



TAX DOCUMENT CHECKLIST

2026 TAX YEAR | 2027 FILING SEASON

What to bring to your tax appointment

Speedys Multi Services LLC • Mattawa, WA

Check the items that apply to you. Not every taxpayer needs every document.

01 PERSONAL INFORMATION

- ☐ Photo ID (driver's license, state ID, or passport)
- ☐ Social Security cards or ITIN letters for everyone listed on the return
- ☐ Dates of birth for you, your spouse, and dependents
- ☐ Current address and contact information
- ☐ Bank routing and account numbers for direct deposit
- ☐ Prior-year tax return, if available
- ☐ IRS Identity Protection PIN (IP PIN), if issued

02 INCOME DOCUMENTS

- ☐ Forms W-2 from all employers
- ☐ Forms 1099-NEC and 1099-MISC
- ☐ Form 1099-K and payment app or card transaction records
- ☐ Forms 1099-INT and 1099-DIV
- ☐ Form 1099-B and investment or digital asset transaction records
- ☐ Forms 1099-R and SSA-1099
- ☐ Forms 1099-G and W-2G
- ☐ Schedules K-1 (partnership, S corporation, estate, or trust)
- ☐ Records of cash income, tips, and other income not reported on tax forms

03 DEPENDENTS & CHILDREN

- ☐ Social Security cards or ITIN letters for dependents
- ☐ Childcare provider's name, address, tax ID, and amounts paid
- ☐ Form 8332, if applicable
- ☐ School, residency, or support records, if needed

04 SELF-EMPLOYMENT / SCHEDULE C

- ☐ Business income and sales records
- ☐ Forms 1099-NEC, 1099-K, and related records
- ☐ Business expense records and receipts
- ☐ Mileage log and vehicle business-use records
- ☐ Equipment/tools: costs and purchase dates
- ☐ Rent, utilities, insurance, advertising, and phone
- ☐ Payroll and contractor payment records
- ☐ Inventory and cost of goods sold records
- ☐ Home office records, if applicable
- ☐ Prior-year depreciation schedule, if available

05 HOMEOWNERS & DEDUCTIONS

- ☐ Form 1098 (mortgage interest); property tax records
- ☐ Charitable contribution records
- ☐ Medical and dental expense records
- ☐ Forms 1098-E / 1098-T (student loan interest/tuition)
- ☐ Retirement and HSA contribution records
- ☐ Forms 1099-SA and 5498-SA, if applicable
- ☐ Energy-efficient home improvement records

06 HEALTH INSURANCE

- ☐ Form 1095-A (Marketplace coverage)
- ☐ Forms 1095-B and 1095-C, if available
- ☐ HSA records, if applicable

07 OTHER IMPORTANT RECORDS

- ☐ IRS or state tax letters and notices
- ☐ Estimated federal/state tax payments
- ☐ Marriage, divorce, or new child information
- ☐ Tip and overtime income records, if applicable
- ☐ Vehicle loan interest records, if applicable
- ☐ Other records relevant to your tax situation

QUESTIONS OR READY TO SCHEDULE? (509) 424-2883

speedysmultisvcslc.com | Fax: (509) 348-4288

IMPORTANT: This checklist is a general guide. Not every document listed will apply to your tax return. Each taxpayer's circumstances are unique, and additional documentation may be requested. For questions about what to bring, please call (509) 424-2883.