



10716 Windingway Dr.
Harrison, OH 45030
513-535-0100
shankandcompanycpa.com

Personal Tax Documents Checklist

PLEASE NOTIFY US OF THE FOLLOWING:

- Birth or death in your family
- Got married or divorced
- Changed jobs or received a promotion
- Moved from one location to another



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Personal Tax Documents Checklist

- NEW CLIENTS ONLY - Prior two years of tax returns***
- All W-2s from your employer(s)
- 1099s: 1099-G, 1099-INT, 1099-DIV, 1099-R, 1099-NEC
- Statements from Social Security (if applicable)
- Stock transactions or mutual fund sales paperwork
- Statements for college tuition or college loan interest
- Moving paperwork: dates of the move, original purchase and sale price of old house, and purchase price of new house



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Personal Information Needed:

- Daycare information if your children are in daycare
- Picture of current driver's license for all drivers covered on this tax return
- Birthdates for all family covered on this tax return
- Social security numbers for everyone in your household
- Bank account information for tax to be electronically drawn or refund to be direct deposited to your account