



**ENCOMPASS
FINANCIAL
SERVICES, Inc.**

Tax Appointment Checklist

What to bring so we can prepare your return accurately

Bookkeeping • Payroll • Tax Planning • Tax Preparation • Tax Resolution

Name: _____

Appointment date: _____

Preparer: _____

EVERYONE

- ☐ Photo ID (and your spouse's, if filing jointly)
- ☐ Social Security cards or ITINs for you, your spouse, and dependents
- ☐ Last year's federal and state tax returns
- ☐ Bank routing and account number for direct deposit
- ☐ Any letters from the IRS or state

INCOME

- ☐ W-2s from every employer
- ☐ 1099s of all types (NEC, MISC, INT, DIV, B, R, G)
- ☐ Schedule K-1s from partnerships, S corps, or trusts
- ☐ Social Security (SSA-1099) and retirement income
- ☐ Rental property income and expenses
- ☐ Any other income (side work, gig apps, crypto)

DEDUCTIONS & CREDITS

- ☐ Mortgage interest (Form 1098) and property tax statements
- ☐ Estimated tax payments you made this year
- ☐ Retirement contributions and HSA forms (5498, 1099-SA)
- ☐ Child care expenses and provider name and tax ID
- ☐ Education expenses (1098-T) and student loan interest (1098-E)
- ☐ Charitable donation receipts
- ☐ Health insurance forms (1095-A if you used the Marketplace)

BUSINESS OWNERS

- ☐ Profit & loss statement and balance sheet through Dec. 31
- ☐ Payroll reports, W-3, and 1099s you issued
- ☐ Vehicle mileage log for business use
- ☐ Home office square footage (if you work from home)
- ☐ Records of major equipment or asset purchases and sales
- ☐ Business loan statements and interest paid

Special circumstances or life events?

If you have any special circumstances or events, please call us for additional documentation requirements.

Missing something? Come anyway.

We'll review what you have and tell you exactly what we still need. Please don't email Social Security numbers or tax documents — bring them to your appointment, or ask us about a secure way to share them.

(931) 919-2543

1835 Memorial Drive, Clarksville, TN 37043 • encompassfinancialservices.net

Tax season (Jan 16 – Apr 15): Mon–Fri 8:00–4:30

Saturday appointments by request