10 Key Solutions — Client Document Checklist

To ensure accurate and timely preparation of your tax return and financial records, please review the checklist below and upload all applicable documents to our secure client portal.

For Individuals

- Driver ’ s license(s) and Social Security numbers for all family members
- Prior-year federal and state tax returns (if new client)
- W-2s, 1099s, SSA-1099s, K-1s, and other income statements
- Mortgage interest (Form 1098) and property tax statements
- Charitable contribution receipts, medical expenses, and education records
- Childcare expenses with provider information
- IRA/HSA contribution statements and estimated tax payments

For Small Businesses & Self-Employed Clients

- Prior-year business return or Schedule C
- EIN, ownership details, and accounting software reports
- Bank and credit card statements, sales/revenue summaries
- Mileage log, office expenses, insurance, and advertising costs
- Payroll summaries and related tax filings (Forms 941/940)
- Home office square footage details (if applicable)

For S Corporations & Partnerships

- Articles of Incorporation or Operating Agreement (for new clients)
- Prior-year federal and state returns
- Balance sheet, profit & loss, and bank statements
- Payroll, shareholder distributions, and depreciation schedules
- State annual report or registration confirmation
- 1099s issued to contractors

Optional / Supporting Documents

- IRS or state correspondence
- Carryforward worksheets (losses, credits, etc.)
- Life event documentation (home sale, marriage, birth, etc.)

• Investment or crypto summaries

Next Steps: Gather your documents, upload them securely to your client portal, and notify us once complete.

10 Key Solutions — Your Key to Clarity, Compliance, and Confidence.

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