

HUMMINGBIRDS BOOKKEEPING & TAX SERVICES

Tax Preparation Checklist

PERSONAL INFORMATION

Please provide:

- Valid Driver's License or State ID
- Social Security Cards (you, spouse, and dependents)
- Prior year tax return (if available)

INCOME DOCUMENTS

Upload **ALL that apply**:

- W-2 Forms (employment income)
- 1099-NEC / 1099-MISC (self-employment)
- 1099-K (Cash App, PayPal, Stripe, etc.)
- 1099-INT (interest income)
- 1099-DIV (dividends)
- 1099-G (unemployment or state refund)
- Rental income records

SELF-EMPLOYED / BUSINESS OWNERS

- Profit & Loss Statement (if available)
- List of business expenses
- Receipts (supplies, marketing, tools, etc.)
- Mileage log (if applicable)

HOME & PROPERTY

- Mortgage Interest Statement (Form 1098)
- Property tax statements
- Closing documents (buying/selling property)

EDUCATION

- Form 1098-T (college tuition)
- Student loan interest (1098-E)

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DEDUCTIONS & CREDITS

- Childcare expenses (name + EIN of provider)
- Medical expenses (if itemizing)
- Charitable donations
- Retirement contributions (IRA, 401k)

DEPENDENTS

- Full names and Social Security Numbers
- Proof of residency (school or medical documents)

BEFORE YOU SUBMIT

- ✓ Make sure all documents are clear and readable
- ✓ Include ALL sources of income
- ✓ Upload everything at once if possible

WHAT HAPPENS NEXT?

After submitting your documents:


- We review your information
- We contact you if anything is missing
- We prepare your return
- We finalize and file


TURNAROUND TIME

You can expect a response within **24–48 hours**

NEED HELP?

Contact us anytime:

 info@hummingbirdsbktax.com

 (512) 766-9096