

Jandu Tax & Advisory – Individual Tax Return Checklist

1. Personal Information

Filing Status: ☐ Single ☐ Married Filing Jointly ☐ Married Filing Separately ☐ Head of Household

- Taxpayer & Spouse: Name, Occupation, SSN, Email, Phone, Address
- Dependent(s): Name, Relationship, DOB, Residency Status, SSN, Income
- Bank Account (for refund or payment)
- Copy of Active ID (Taxpayer & Spouse)
- Health Insurance (Form 1095-A/B/C)

2. Income Documents

- W-2 (Wages), W-2G (Lottery, Gambling Winnings)
- 1099-NEC / 1099-MISC / 1099-K (Contractors / Self-employed)
- 1099-B (Stocks, Capital Gains)
- 1099-INT / 1099-DIV (Interest / Dividends)
- 1099-R (Retirement Distributions)
- 1099-G (Unemployment, State Refunds)
- Child Tax Credit Letter
- Rental Income Records
- Foreign Income (if applicable)

3. Deductions & Credits

- Donations
- Medical Expenses
- Childcare Expenses
- Real Estate & Property Taxes
- Mortgage Interest (Form 1098)
- Education Expenses (Form 1098-T, 1098-E)
- Business / Self-Employed Expenses with Documentation
- Prior Year Tax return
- Any other documents you believe are relevant

4. Document Submission

To protect your privacy and identity, please upload all sensitive files via our secure client portal rather than email.

Thank you for trusting Jandu Tax & Advisory with your tax preparation needs!