M
METZGER TAX SERVICE LLC

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Specializing in Individual, Small Business, Non-profits, Estate & Trusts

QUICK CHECK LIST

Gather your personal tax documents and get them to us before Friday, March 7th to ensure you are not on extension. The deadline for businesses (partnership and Sub Chapter S) is Friday, February 14th to ensure no extension.

1. All copies of W-2's, 1099's, K-1's and 1099-K's forms. Also, if you received any **1095(s)** which is information from the Health Insurance Marketplace, we must have copies of these forms.
2. If you received money from Stripe, PayPal, Cash App, Venmo, Amazon, Square, Zelle, E-bay, or other electronic payment systems; provide us with from 1099-K's if generated.
3. All year-end mortgage loan statements, including those refinanced or paid off and 1098 forms. If you refinanced or got a new mortgage loan, we will need the closing papers.
4. Copy of all closing papers on purchase or sale of home or property.
5. Detailed investment activity reports from your investment brokers. Annual form 1098. Provide ALL pages.
6. Unemployment compensation (1099-G), and social security benefits (Form 1099-SSA).
7. All itemized deduction support. Remember that we still need all itemized details for your State return(s). Itemized deductions include property tax statement, City of Portland art tax, mortgage interest 1098 forms, out of pocket medical costs, and proof of contributions.
8. If you were involved with any form of cryptocurrency, please provide a detail of each transaction.
9. If you have any foreign financial accounts, we will need details – please contact us for details needed.
10. Schedule summarizing business or rental income and expenses (by property).
11. Payment record of estimated tax payments paid for the 2024 tax year including date and amount.
12. Childcare: Name, address, social security or Tax ID, and amount paid to each provider. By child.
13. Any IRS or State correspondence you may have received during the year.
14. College breakdown: Payment detail for tuition, fees, books and supplies, and form 1099-T. By student.
15. If you changed bank accounts and expect a refund, please enclose a current voided check.
16. If we do not already have on file, we are required by the IRS to make copies of government issued ID for individuals listed on the tax return and maintain it in our files. This is for your fraud protection. For any dependent listed on your return, we must have a copy of their birth certificate AND Social Security card.
17. New clients – Welcome. We will need your prior 2 years tax returns, if not previously supplied.

Remember, in this electronic world, many of your required tax forms are NOT mailed to you. You may need to login to your online accounts or call the company to get necessary tax forms!