



# TAXPAYER CHECKLIST

ONCE YOU HAVE GATHERED ALL YOUR DOCUMENTS  
PLEASE CLICK THE LINK BELOW TO DOWNLOAD THE  
RNZ APP AND UPLOAD YOUR DOCS

## PERSONAL

- SOCIAL SECURITY NUMBER/ CARDS FOR ALL FAMILY MEMBERS
- UNEXPIRED IDENTIFICATION
- COPY OF PREVIOUS YEARS TAX RETURN
- DOB FOR EVERYONE ON RETURN
- BIRTH CERTIFICATES/ PROOF OF RELATIONSHIP STATUS FOR DEPENDENTS
- PROOF OF RESIDENCY
- REFUND DISBURSEMENT METHOD

## INCOME

- W-2
- 1099
- IRS/ 401K DISTRIBUTIONS

## HOMEOWNERS

- MORTGAGE & INTEREST STATEMENT
- REAL ESTATE TAX RECEIPT
- ENERGY EFFICIENT UPGRADE RECEIPTS
- RENTAL INCOME AND EXPENSES
- 1099-S FOR SALE OF PROPERTY

## BUSINESSES/ SELF EMPLOYED

- 1099-NEC, 1099-K
- PROFIT & LOSS OR RECEIPTS FOR EXPENSES INCLUDING YEAR TO DATE GROSS INCOME
- BUSINESS NAME & TAX ID NUMBER
- ASSETS & EQUIPMENT LIST

## MISC. ITEMS

- RECEIPTS FOR ESTIMATED TAX PAYMENTS
- EDUCATION EXPENSE- (1098T, INTEREST, SUPPLIES, TUITION)
- CHILD CARE EXPENSES, NAME OF PROVIDER, EIN
- OUT OF POCKET MEDICAL/ DENTAL EXPENSES
- IHSA CONTRIBUTIONS/ DISTRIBUTIONS
- Clean and organize the garage or storage areas
- CHARITABLE DONATIONS RECEIPTS (TITHES)