

DeMar Consulting Group (DCG)

Tax Preparation Checklist – 2025–2026

Use this checklist to gather the documents and information needed to prepare your tax return efficiently. Not all items will apply to every taxpayer.

1. Personal & Identifying Information

- Social Security Number (SSN) or ITIN (you, spouse, and dependents)
- Dates of birth for all dependents
- Current mailing address
- Bank routing and account numbers for refund or payment
- IRS Identity Protection PIN (if applicable)

2. Income Documents

- W-2 forms from all employers
- 1099-INT (interest income)
- 1099-DIV (dividend income)
- 1099-B (brokerage transactions)
- 1099-G (unemployment or state tax refunds)
- 1099-NEC or 1099-MISC (self-employed or contract income)
- Schedule K-1 (partnerships, S corporations, trusts)
- 1099-R (retirement or pension distributions)
- SSA-1099 (Social Security income)
- 1099-K (third-party payment platforms, if applicable)

3. Deductions & Credits

- Mortgage interest statement (Form 1098)
- Property tax records
- Student loan interest (Form 1098-E)
- Tuition statements (Form 1098-T)
- Charitable contribution receipts (cash and non-cash)
- Medical expense receipts (if itemizing)
- Childcare expenses and provider information
- Energy-efficient home improvement records

4. Small Business & Self-Employed (If Applicable)

- Employer Identification Number (EIN)
- Business income records (invoices, deposits)
- Business expense receipts
- Profit and loss statement
- Vehicle mileage log for business use
- Home office documentation
- Estimated tax payments (Form 1040-ES)

5. Other Helpful Documents

- Prior year tax return
- Estimated tax payment confirmations
- Rental property income and expense records
- Digital asset transaction records (crypto)
- Alimony paid or received documentation (if applicable)

This checklist is for general informational purposes and does not replace personalized tax advice. For questions or assistance, contact [DeMar Consulting Group](#).