

Acc Associates of Austin

Attention: Cesar Jimenez Lithgow
10 Swiftwater Trail · The Hills, Texas 78738
Phone: 512-326-8608 · Email: Accassociates@Accassociates.com

Client Document Checklist – Individual Income Tax Return (Form 1040)

Tax Year 2025

Confidentiality Notice

All documents and information provided to Acc Associates of Austin are treated as confidential and are used solely for tax preparation and related professional services, subject to applicable federal and state privacy laws and professional standards.

1. Personal & Administrative Information

- Taxpayer and spouse full legal names
- Social Security numbers or ITINs
- Dates of birth
- Current mailing address, phone number, and email
- Government-issued photo ID
- Prior-year federal and state tax returns
- Bank routing and account numbers

2. Dependent Information

- Dependent names and SSNs
- Dates of birth
- Relationship to taxpayer
- Months lived with taxpayer
- Childcare provider name, address, and EIN/SSN

3. Income Documents

- Forms W-2
- Forms 1099-NEC
- Forms 1099-MISC
- Forms 1099-INT
- Forms 1099-DIV
- Forms 1099-B
- Forms 1099-R
- SSA-1099
- 1099-G (unemployment)
- Schedule K-1s
- Cryptocurrency transaction reports

4. Adjustments & Contributions

- IRA contribution statements
- HSA Form 1099-SA
- HSA Form 5498-SA

Student loan interest (Form 1098-E)
Self-employed health insurance premiums

5. Business Income & Expenses

Business income summary
Mileage logs
Business expense details
Home office information
Equipment and asset purchases

6. Itemized Deductions

Mortgage interest (Form 1098)
Property and state/local taxes
Charitable contribution receipts
Medical and dental expenses

7. Education & Credits

Form 1098-T
Tuition and book receipts
Child and dependent care expenses
Energy-efficient improvement receipts

8. Multi-State / Out-of-State Information

W-2s with multi-state wages
Out-of-state income statements
Dates of residency by state
Out-of-state estimated tax payments
Other state tax returns

9. Additional Documents or Information

Client Communication Preferences

Best time for a phone call:

Preferred document delivery method: Email Personal Pick Up

Pick-up address (if applicable):

Best time for pick-up:

Client Acknowledgment

I certify that the information and documents provided are complete and accurate to the best of my knowledge.

Client Signature: