Wealthwize FINANCIALS

Guiding Families and Small Business to Protect, Grow & Build

Legacy | Freedom | Impact

FREE GUIDE

Tax Prep Readiness Checklist

Everything to gather before your tax appointment — for individuals, small business owners, and real estate investors — so we can move fast, file accurately, and find every deduction you're owed.

Purpose · Faith · Vision

A note from Cynthia

A little prep goes a long way.

The more organized you are walking in, the faster we can file, and the more likely we are to catch every deduction and credit you qualify for. Use this checklist to gather what you need before we meet — you don't need everything on this list, just what applies to you.

Personal & Household Info

- Government-issued ID and Social Security numbers for you, your spouse, and dependents
- Prior year's tax return (helpful, not required)
- Bank account and routing number for direct deposit

Income Documents

- W-2s from all employers
- 1099s (contract work, investments, retirement distributions, unemployment, etc.)
- Records of any other income (rental, side business, alimony)

Deductions & Credits

- Mortgage interest and property tax statements
- Childcare, education, or medical expense records
- Charitable donation receipts
- Retirement contribution records (401k, IRA, etc.)

If You Own a Business

- Profit & loss statement or bookkeeping records (QuickBooks, spreadsheets, etc.)
- Business expense receipts and mileage log
- Prior year business return, if applicable

If You Own Rental or Investment Property

- Rental income and expense records for each property
- Closing statements for any property bought, sold, or refinanced this year
- Prior year depreciation schedule
- Mortgage interest statement (Form 1098) for each rental property
- Cost segregation study, if one was completed

Ready to file?

Bring what you have — we'll take it from there.

Book a Tax Consultation

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