



# LDW Tax & Accounting Services

## Tax Season Prep Checklist

Preparing early for tax season helps ensure accuracy, maximize deductions, and reduce stress. Use this checklist from LDW Tax & Accounting Services to make sure you have everything ready for your filing — whether you're an individual or a small business owner.

### ✓■ For Individuals & Families

- Social Security numbers (for yourself, spouse, and dependents)
- W-2 forms from all employers
- 1099 forms (for contract work, unemployment, or interest income)
- Records of any unemployment benefits, Social Security, or pension income
- Mortgage interest statement (Form 1098)
- Property tax receipts
- Charitable donation receipts
- Education expenses and student loan interest statements (Form 1098-E/T)
- Healthcare coverage forms (1095-A/B/C)
- Any prior-year tax return (if not filed with LDW)

### ✓■ For Small Business Owners

- Employer Identification Number (EIN) and business formation documents
- Income statements and balance sheets
- Bank statements and business credit card records
- All 1099 forms issued and received
- Payroll reports and contractor payments
- Business-related expense receipts (supplies, travel, marketing, etc.)
- Mileage log or vehicle expense records

- Home office information (square footage, rent, utilities)
- Estimated tax payments made throughout the year
- Any new equipment or asset purchases for depreciation tracking

**Pro Tip:** Keeping your records organized throughout the year can save time and uncover deductions you might otherwise miss. Need help preparing or filing? LDW Tax & Accounting Services is here to help — with honesty, accuracy, and care.

**Contact Us:**

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