



TS Tax Solutions, LLC.- Arlington Ballpark Way
2000 East Lamar Blvd, Suite 638
Arlington, TX 76006
Office: (817) 303-2135
Fax: (682) 320-8002
info@tstaxsolutions.net
www.tstaxsolutions.net

Taxpayer Checklist

(Information you will need before getting your taxes prepared)

PERSONAL INFORMATION

- Valid Picture ID
- Social Security Card For you and your dependents
- Last Year Tax Return (If Applicable)

INFORMATION ON YOUR DEPENDENTS

- Date of Birth
- Social Security Numbers
- Childcare Records
- If You Qualify For EITC you will need additional information for your dependents

*****Choose At Least One Record That Shows Your Dependent Residency

1. School Records
2. Daycare Records
3. Medical Records
4. Lease Agreement

INCOME

- W2's State Income Tax Refund
- 1099 Misc. 1099 R (Pension Income)
- 1099 INT Unemployment Compensation
- 1099 DIV Rental Income
- 1099 B Gambling or Lottery Winnings

EXPENSES

- Real Estate Taxes
- Tithes and Offering
- Mortgage Interest
- Charitable Contributions



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- Employee Business Expenses
- Student Loan Interest
- Moving Expenses
- Private Mortgage Insurance

EDUCATION EXPENSES

- Form 1098T
- Receipts for Tuition and Books

SMALL BUSINESS EXPENSES

- Advertising
- Repairs and Maintenance
- Commission
- Supplies
- Office Expense
- Taxes and License
- Insurance
- Legal and Professional Services
- Mileage Receipts
- Misc. Items

(Any Expenses That Are Used to Operate the Use of Your Business)

HEALTHCARE EXPENSE

- 1095A
- 1095B
- 1095C