



U.S. TAX CHECKLIST

Income Slips:

- Employment Income (W-2)
- Tips (If not reported on W-2)
- Investment Income - Interest, Dividends (1099-INT, 1099-DIV)
- Investment Income – Capital Gains (1099-B)
- Social Security Pension (SSA-1099)
- Pension Income (1099-R)
- Unemployment Income or Other Government Payments (1099-G)
- Self-Employment Payments (1099-NEC)
- Partnership/Shareholder Income (K-1)
- Gambling Winnings (W2-G or 1042-S)
- Other US Income (1099-MISC or 1042-S)

Other Common Documents/Information:

- Cryptocurrency Statement (Form 1099-DA if held in the US)
- Annual Statement for TFSA, RESP, RDSP, and/or Roth IRA
- Completed FBAR/Form 8938 Template (available on our website) if required
- Tuition Tax Slips (1098-T)
- Receipts for contributions to IRAs, HSAs, and FSAs
- Health Insurance Coverage Form (1095-A)
- IRS Prepayments Made (1040-ES)

Documents for Deductions:

- Summary of Medical Expenses
- Statement of overtime hours worked in the year
- Mortgage Interest (Form 1098)
- Charitable Donation Receipts
- Student Loan Statements or Slip (1098-E)
- Union or Professional Dues Receipts
- Child Care Expense Receipts
- Carrying Charges, Brokerage Fees, and Interest Expenses on Investments
- Proof of State income tax paid in prior year
- Summary of Adoption Expenses
- Cost of uniforms for work purposes
- Statement of Interest Charges on New Car Loans (cars purchased after Dec. 31, 2024)