



Tax Return Checklist / Individuals

The following serves as a list of typical tax documents. It is not exhaustive and some documents may not apply.

If we didn't file your return last year please bring/upload the most recently filed Federal & State Tax Returns

(Information carries from one year to the next. Be sure to include all of the statements and schedules with the returns)

Individual Returns

- 1) W2 or 1099-NEC for income from a job or earned as a contractor.
- 2) 1099 for interest, unemployment compensation, or prior year refunds.
- 3) 1099R or 1099SSA for retirement or social security income.
- 4) Rental Income (please submit an income summary or the 1099-MISC if received).
- 5) 1099-B from Brokerage Accounts.
- 6) Health Savings Account Contributions.
- 7) Charitable Contributions & Receipts for Fire Mitigation (yes, this can be a credit in Colorado).
- 8) Sale of Home: Closing Statement at Purchase & Sale. Itemized list of improvements and their costs.
- 9) Valid Driver's License if we don't already have a copy
- 10) Dependent information: Name, DOB & SSN (if we don't already have it). Any special situations we need to know about.
- 11) Upload a voided check if you would like any refund(s) directly deposited.

Annual Tax Return Questions

Did you make any Estimated Tax Payments? If so, please upload the payment confirmations to the client portal or upload amount paid.

Did you buy or sell virtual currency or maintain signature authority over any foreign accounts?

If you owned rentals or a business: Were 1099's required? If so, were they issued?

Individual Return Filing Deadline: April 15th

Cutoff Date Individual Returns: March 9th

Extension filing fee: \$100

Turnaround Time

From the time information is submitted, please allow a 7-10 business day turnaround time before we dig into the return and reach out with any questions.