Remedy Tax Services

WORKSHEET 01
GETTING STARTED

What to gather for your tax return

What you need depends on your year. Tick what applies, gather those papers, and your return can usually be finished in one sitting. Most people need only a part of this list.

You and your household

- [ ] Photo ID for each adult on the return
- [ ] Dates of birth for you, your spouse and each dependent
- [ ] Last year's federal and state returns (new clients)
- [ ] Social Security card or ITIN letter for everyone on the return
- [ ] Identity Protection PIN from the IRS, if one was issued
- [ ] Bank routing and account number for your refund or payment

Children and other dependents

- [ ] Childcare provider's name, address, tax ID and the amount you paid
- [ ] Form 8332 if a child's other parent is releasing the claim to you
- [ ] Income earned by a dependent or another adult in your home
- [ ] School or medical records showing where a child lived, if asked

Income

Bring every form you received. Many arrive in January and February.

WORK AND BENEFITS

- [ ] Form W-2 from each employer
- [ ] Form 1099-G for unemployment or a state refund
- [ ] Form 1099-R for pensions, IRAs and annuities
- [ ] Last pay stub of the year (shows tips and overtime)
- [ ] Form SSA-1099 or RRB-1099 for Social Security or railroad benefits
- [ ] Amounts you already paid tax on in a traditional IRA (basis)

SELF-EMPLOYMENT AND SIDE WORK

- [ ] Forms 1099-NEC, 1099-K and 1099-MISC
- [ ] Expense records: receipts, bank and card statements
- [ ] Home office measurements and home costs
- [ ] Estimated tax payments made, with dates
- [ ] A record of income not shown on any form, including cash
- [ ] Mileage log and vehicle costs
- [ ] Equipment bought: what, when and cost
- [ ] Annual tax summary from Uber, Lyft or delivery apps

RENTAL PROPERTY

- [ ] Rent received and expenses for each property
- [ ] Purchase date, cost and improvements, for depreciation

SAVINGS AND INVESTMENTS

- [ ] Forms 1099-INT, 1099-DIV and 1099-OID
- [ ] Purchase dates and cost of anything sold, if not on the form
- [ ] Forms 1099-SA or 1099-LTC (health savings, long-term care)
- [ ] Form 1099-B or 1099-S for sales of stock or property
- [ ] Digital asset records: Form 1099-DA or transaction history
- [ ] Schedule K-1 from a partnership, S corporation or trust

OTHER INCOME

- [ ] Gambling winnings (Form W-2G) and a record of losses
- [ ] Alimony received, with the date of the divorce agreement
- [ ] Foreign income, and foreign bank account balances
- [ ] Jury duty pay, prizes and awards
- [ ] Royalties, hobby income and any other Form 1099
- [ ] Canceled debt (Form 1099-C)

Deductions and credits

These lower your tax. Bring what applies even if you are not sure it counts.

HOME AND VEHICLE

- [ ] Form 1098 mortgage interest statement
- [ ] Closing disclosure if you bought, sold or refinanced
- [ ] New for 2026: loan interest statement and VIN for a new vehicle
- [ ] Real estate and personal property (car) tax bills
- [ ] Receipts for energy-saving home improvements
- [ ] Electric vehicle purchase papers

GIVING AND MEDICAL

- [ ] Receipts for cash gifts to charity
- [ ] Miles driven for charity or medical care
- [ ] Health insurance premiums you paid with after-tax money
- [ ] List and value of donated goods
- [ ] Medical, dental and prescription costs you paid yourself
- [ ] Form 1095-A if you had Marketplace coverage

FAMILY AND EDUCATION

- [ ] Daycare, preschool and day camp payments
- [ ] Form 1098-T from a college, plus receipts for books
- [ ] Scholarships and grants received
- [ ] Dependent care FSA amount from work
- [ ] Form 1098-E for student loan interest
- [ ] Classroom supply receipts (K-12 teachers)

SAVINGS AND SPECIAL SITUATIONS

- [ ] Form 5498 for IRA contributions; Form 5498-SA for an HSA
- [ ] Records of a loss in a federally declared disaster area
- [ ] State or local income tax paid besides withholding
- [ ] Any letter from the IRS or a state tax agency

New on 2026 returns

Four deductions that many people will claim for the first time. Tell us if any apply.

- [ ] I earned tips
- [ ] I was paid overtime
- [ ] I or my spouse turned 65
- [ ] I pay interest on a loan for a new car

Questions for your preparer

Write them down now so nothing is forgotten at the appointment.

Three ways to get your papers to us

1. Upload. Photograph or scan each paper and add it to your secure client vault at the client portal. Files are encrypted on your device. **2. Bring them.** We are open seven days a week at 6000 Stevenson Ave, Suite 303, Alexandria. **3. Not by email.** Ordinary email is not safe for tax documents.

Keep it safe. Do not write full Social Security numbers or bank account numbers on this sheet. Give those in person, or upload the documents to your secure client vault. Please do not email this worksheet; upload it at the client portal instead.