DAWN M JAKE CPA PLLC • 420 CLINE AVE PORT ORCHARD, WA 98366 • P:360.329.7090 • F:360.329.7087

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PERSONAL TAX PREPARATION DOCUMENT LIST

- A completed “New Client” form (if applicable)
- Copy of both sides of each taxpayer’s driver’s license
- Copy of previous year’s 1040 return (if not prepared by our office)
- Statement of Earnings from Social Security, Unemployment, Alimony, and any other miscellaneous income*
- Statement of Earnings from rentals, royalties or farming income
- All W-2 and W-2G (gambling income/loss) Forms
- All 1099-R forms (distribution, pension, ira, etc.)
- All 1099-INT forms (interest, dividends, stock sales, etc.)
- All brokerage statements for stocks, bonds, crypto currency transactions
- Any K-1 income/loss statements for partnerships, S-Corps, etc.
- All 1098 forms (mortgage interest)
- All stimulus or Economic Impact Payment letters
- All 1095-A forms (Health insurance marketplace through WA State)
- Property Tax statement
- All Charitable donation letters, receipts, copies of checks, etc.

Please note that not all of the above may apply to you

*If you are a sole proprietorship and report your business income on your 1040 return, please see our “Business Tax Preparation” list for additional documents that we will need.