

# BRICK TAXES 2026 PROFESSIONAL PREPARATION CHECKLIST

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## IDENTITY VERIFICATION (FULL HOUSEHOLD)

- Full Names, SSNs & Dates of Birth  
Required for **EVERY** person on the return.
- ID Proof / Dependent Residency  
**Adults:** Driver's License & SS Card. **Children:** SS Card required (Birth Certificate optional). Proof of residency for kids (School, Medical, Daycare, or official mail).
- IRS Identity Protection PIN (IP PIN)  
Required for any household member if issued for the current tax season.
- Direct Deposit Information  
Bank Name, Routing Number, and Account Number. (Voided check preferred).

## INCOME SOURCES & PERSONAL DEDUCTIONS

- W-2s, 1099s & Investment Income  
Wages, NEC, Interest, Dividends, Stock/Crypto Sales, Pensions, and Social Security.
- Mortgage Interest & Property Taxes  
Form 1098 from your lender.
- Medical & Dental Expenses  
Total out-of-pocket. **NJ State benefit begins at 2% of Gross Income.**
- Charitable Contributions & Education  
Cash/Non-cash receipts, 1098-T, and Childcare Provider info.

## BUSINESS & SCHEDULE C SECTION

## SELF-EMPLOYED / SOLE PROPRIETOR

- Federal & State Formation Documentation  
Legal formation records for your entity. (Skip if previously provided).
- Profit & Loss Statement  
Annual summary of business performance.
- Gross Receipts  
Total of all 1099-K, 1099-NEC, and all Cash/Zelle payments received.
- Operating Expenses  
Summarize totals for: **Advertising, Insurance, Contract Labor, Interest, Commissions, Office Expenses, Rent Paid, Supplies, Professional Fees, Travel, Equipment Costs, Service Fee/Merchant Costs, and Utilities (Cell phone, etc.).**
- Vehicle Log & Home Office  
Business/Commuting/Total miles; workspace vs total home square footage.

**To ensure the highest level of accuracy and efficiency during our consultation, please ensure all tax data is summarized and totaled prior to our appointment. This includes finalizing the sums for all income sources, medical expenses, charitable contributions, and miscellaneous deductions. Arriving with these 'ready-to-input' totals allows us to move past manual calculations and focus our session on high-level tax strategy and maximizing your return.**

### DO NOT EMAIL OR TEXT THIS PAGE

This document contains sensitive personal information. To protect your identity and prevent your data from "floating around the internet for a thousand years," please upload all records only via our secure TaxDome portal.

Brick Taxes LLC | 732-540-1040 | Brick Township, NJ | Authorized IRS E-File Provider