

Your tax document guide

Choose every category that applies. These are starting points, not a complete list for every return. Upload documents through TaxDome; do not email sensitive records.

Simple return

- ☐ Photo ID and taxpayer identification details for you, your spouse and dependents; upload securely.
- ☐ Prior-year return if you are new to Handled, IRS identity-protection PINs if issued, and direct-deposit details.
- ☐ All income forms received, even if your return seems simple: W-2s, 1099s, interest and other income.
- ☐ Health insurance Form 1095-A if covered through the Marketplace; dependent, childcare and education information if applicable.
- ☐ Estimated tax payment dates and amounts, IRS/state letters, and notes about moves, marriage, dependents or other changes.

Employed

- ☐ Start with the Simple return list, then add every W-2 from all employers.
- ☐ Stock compensation documents, brokerage statements and purchase/cost-basis records where applicable.
- ☐ Records supporting qualified tips or overtime deductions if applicable; a payroll breakdown may be needed.
- ☐ Work-state and move dates if you worked or lived in more than one state; foreign-income details if applicable.

Retired

- ☐ Start with the Simple return list, then add Forms 1099-R, SSA-1099 and RRB-1099 as applicable.
- ☐ IRA contributions, distributions, rollovers and Roth conversion details, plus prior nondeductible IRA/basis records.
- ☐ Qualified charitable distribution confirmations, investment statements and relevant health/long-term-care expenses.
- ☐ Required minimum distribution information and any inherited retirement account documents.

Small business owner

- ☐ Start with the Simple return list. Provide completed income and expense totals or a finalized profit-and-loss report.
- ☐ All business income, including cash, checks and payment apps; Forms 1099-NEC, 1099-K and other business statements.
- ☐ Equipment/asset purchases and sales with dates, costs and financing; prior depreciation schedules for new clients.
- ☐ Vehicle mileage records, business-use details, home-office measurements and applicable expense totals.
- ☐ Payroll/contractor records, health insurance and retirement contributions, estimated payments, and entity changes. Bookkeeping completion is not included.

Rental property owner

- ☐ Start with the Simple return list. Provide income and expenses separately for each property.
- ☐ Rental statements, mortgage interest, property taxes, insurance, management fees and repairs/maintenance totals.
- ☐ Purchase, refinance or sale closing statements; improvement costs and placed-in-service dates.
- ☐ Prior depreciation schedules, personal-use/rental days, and records for vehicles or travel relating to the property.
- ☐ Short-term rental platform statements and service details; notes about vacancies, conversions or ownership changes.

Returning clients may request a printable organizer showing prior-year figures. Your TaxDome organizer and follow-up requests will guide the details for your return.