

Tax Readiness Checklist W-2 Employees

For individuals who receive a W-2
from their employer



GREEN LOTUS
BUSINESS SOLUTIONS

Have questions?

We're here to help.

Give us a call at (323) 629-7550

Mon-Fri 10 a.m. to 7 p.m. PT

Sat 11 a.m. to 4 p.m. PT

or email

support@greenlotusbs.com



Personal Information

- ❑ Full legal name, Social Security Number (SSN), or ITIN
- ❑ Date of birth and current address
- ❑ Driver's license or state ID
- ❑ A copy of last year's tax return (if available)



Income Documents

- ❑ W-2 from all employers
- ❑ 1099-INT (Interest Income) or 1099-DIV (Dividends) if applicable
- ❑ 1099-G (Unemployment benefits or state tax refunds)
- ❑ SSA-1099 (Social Security benefits) if applicable
- ❑ Any additional income (side jobs, rental income, or other sources)



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Deductions & Credits

- ❑ Student loan interest (Form 1098-E)
- ❑ Tuition and education expenses (Form 1098-T)
- ❑ Childcare expenses (provider name, address, and Tax ID/SSN)
- ❑ Mortgage interest (Form 1098) and property taxes
- ❑ Medical and dental expenses (if significant)
- ❑ Charitable donations (cash and non-cash) with receipts
- ❑ IRA, HSA, and retirement contributions



Other Important Documents

- ❑ IRS or state tax agency notices (if applicable)
 - ❑ Direct deposit information (Bank name, routing number, account number)
- 📌 Tip: If you changed jobs, make sure you have a W-2 from every employer you worked for during the tax year.



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