

Gathering & Sending Your Tax Documents to SSG

The quality of your tax return, the timeliness of its preparation, and our fee depend strongly on obtaining all your tax documents and information in an efficient manner. As more companies move to electronic delivery of their tax documents and statements, this checklist will help ensure you are not missing important tax documentation.

Sending Source Documents to SSG (use any combination of the below options)

1. Mail or Drop off SS+G Office - Client Originals or Copies
2. Dropbox (Secure) - Notify SSG team member once you are completely done uploading.
 - a. Easy Dropbox Upload Links – Request link from jmg@ssgltd.com (NO account signup required) (Allows Drag and Drop secure uploads directly to our shared Dropbox Uploads Folder)
 - b. Manually Upload to Dropbox
3. [SSG Representative Direct Upload Link](#) (Secure) Located on email signature line of every SSG team member.
4. Email (Not Secure) – Please be advised sending any sensitive information via email (even password protected PDF) is NOT considered secure by the IRS and cybersecurity professionals. We recommend using a secure option listed above.

Worksheets

- Contact Information
- Dependents, Child Care
- Education, Tuition, Student Loans, 529
- Deductions, Medical, Home, Charity
- Small Business
- Rental Property
- Auto Expenses
- Home Office
- Property Sale
- Expat, Foreign Earned Income
- 2021 Tax Questionnaire
- Retirement

Income

- W-2s from Employers
- K-1s from Partnerships, S Corps, Investments, Trusts, Estates
- 1099s from Banks, Investment Brokers, Government Agencies, Contract Employers, etc.
- Cost Basis, Purchase History for Stock Sales (if you received a 1099-B) and Cryptocurrency Home Deductions
- 1098s from Mortgage Lenders (the form is now required, not just the figures)
- Home Purchase / Refinance Documents, Closing Disclosure / Settlement Statements
- Private Mortgage Insurance (PMI) Premiums, Year-End Loan Statements
- Property / Real Estate Taxes Paid

Small Businesses

- Small Business Set Up
- Small Business Operations
- Auto Expense
- Home Office
- List of equipment, service dates, values, if depreciated in earlier years

Rental Properties

- Rental Property Worksheet
- Auto Expense Worksheet
- Closing Disclosure / Settlement Statements or HUDs for purchases, refinances and/or sales
- Prior year depreciation schedules showing cost basis and service dates
- List of improvements, completion dates, values, if depreciated in earlier years
- Form 8582 or similar detailing any disallowed passive losses from prior years on your rental properties