Before You Book

Tax Preparation Checklist
Blush & Balance Assist

To keep your appointment calm, efficient, and compliant, please gather the following items before scheduling. You only need to provide what applies to your situation.

Personal Information

1. Valid photo ID
2. Social Security number or ITIN (you, spouse, and dependents)
3. Current address and contact information
4. Bank account and routing number for refunds or payments

Income Documents

1. W-2s from all employers
2. 1099 forms (NEC, MISC, K, INT, DIV, G, SSA-1099 as applicable)
3. Any additional income records (side gigs, cash income, rental income)

Self-Employed or Small Business (if applicable)

1. Income summary or profit & loss report
2. Business expenses and receipts or categorized totals
3. Mileage or vehicle use records
4. Home office details, if applicable

Other Common Items

1. Dependent and childcare information
2. Health insurance forms (1095-A, 1095-B, or 1095-C)
3. Education records (1098-T, 1098-E)
4. Mortgage interest or property tax statements
5. Charitable donation receipts
6. Last year’s tax return (recommended)

Blush & Balance Assist provides tax preparation services only and is not a CPA, law firm, or Enrolled Agent service. Tax preparation cannot begin without complete and accurate documentation. Final responsibility for filed returns remains with the taxpayer. Pricing is confirmed after document review.