VITOLO TAX AND FINANCIAL SERVICES LLC

January Tax Readiness Checklist

A simple way to get your documents in order before tax season — so filing is calm, complete, and on time.



David Vitolo — Founder & Tax Preparer
PTIN · IRS Annual Filing Season Program (AFSP) participant · Jacksonville, Florida

1 · GATHER THESE DOCUMENTS

- ☐ Photo ID
- ☐ Social Security cards for everyone on the return
- ☐ W-2s from every employer
- ☐ 1099-NEC / 1099-K (gig and contract work)
- ☐ 1099-INT / 1099-DIV (interest and dividends)
- ☐ SSA-1099 (Social Security benefits)
- ☐ 1098 (mortgage interest statement)
- ☐ Records of estimated tax payments you made
- ☐ Last year's tax return
- ☐ Self-employed: income and expense records by category, plus your mileage log
- ☐ Rental property: rent received and expenses, by property
- ☐ 1098-T (education expenses)
- ☐ Childcare provider information (name, address, tax ID, amount paid)
- ☐ HSA and IRA records

2 · DO THESE BEFORE JANUARY

- ☐ Check your W-4 and your last pay stub — make sure your withholding still fits your life.
- ☐ If you are self-employed, make your fourth-quarter estimated tax payment by January 15.
- ☐ Gather your documents into one folder — paper or digital — so nothing has to be hunted down later.
- ☐ Note any life changes: marriage, a baby, a new home, a new job, or a new business.

3 · KEY DATES

January 1, 2027	Vitolo Tax intake opens — waitlist members first.
January 15, 2027	Fourth-quarter estimated tax payment due.
April 15, 2027	Filing deadline.

4 · HOW VITOLO TAX WORKS

One flat fee, quoted in writing before any work begins: $99 simple W-2 return · $349 Plus · $549 self-employed · $599 rental.

Federal returns only. We do not prepare state returns for residents of California, Oregon, New York, or Maryland.

100% remote — no office visit needed. Service in English and Spanish.

Join the waitlist: vitolotax.com

Your return is prepared and signed by David Vitolo.

This checklist is a general organizational aid, not tax advice. Please keep your original documents in a safe place.