

Tax Return Checklist

(All items may not apply)

General Information	
<input type="checkbox"/> Copy of prior year tax return (new clients only) <input type="checkbox"/> Date of Birth and social security number for all taxpayers and dependents (new clients only) <input type="checkbox"/> Copy of current valid driver's license (new clients and licenses that have recently renewed) <input type="checkbox"/> "Void" Check (for direct deposit of refund) <input type="checkbox"/> Amount of Stimulus (Economic Impact) Payment received in 2020 and/or January 2021 (Notice 1444)	
Income	Other Income
<input type="checkbox"/> W-2 (Wages) <input type="checkbox"/> 1099-INT (Interest income) <input type="checkbox"/> 1099-DIV (Dividend income) <input type="checkbox"/> Foreign bank accounts, income +/- paid taxes <input type="checkbox"/> Crypto Currency Transactions (Virtual Currency) <input type="checkbox"/> 1099-B (Stock sale/capital gains) <input type="checkbox"/> 1099-R (Pension distributions) <input type="checkbox"/> Schedule K-1 from Partnership, S Corp or Trust	<input type="checkbox"/> Alimony received <input type="checkbox"/> 1099-G (Unemployment, state and local tax refunds) <input type="checkbox"/> 1099-SSA (Social Security benefits) <input type="checkbox"/> Disability income <input type="checkbox"/> 1099-NEC / 1099-MISC <input type="checkbox"/> Tip income not reported on Form W-2 <input type="checkbox"/> 1098-T <input type="checkbox"/> 1099-Q (Education savings account withdrawal) <input type="checkbox"/> Form W2-G (Gambling Income)
Small Business	Rental Property
<i>Self-employed or independent contractor business owner</i> <input type="checkbox"/> 1099-NEC/1099-MISC (Business income) <input type="checkbox"/> Income not reported on Form 1099 <input type="checkbox"/> Itemized business expenses— Business Organizer <input type="checkbox"/> Vehicle information (mileage etc.)	<input type="checkbox"/> 1099-MISC (Rental income) <input type="checkbox"/> Income not reported on Form 1099—MISC <input type="checkbox"/> Related Expenses— Rental Property Organizer
Real Estate	Tax Payments
<input type="checkbox"/> HUD-1 Closing statement – sale of property <input type="checkbox"/> HUD-1 Closing statement – purchase of property <input type="checkbox"/> Itemized additions/improvements <input type="checkbox"/> 1099-C or 1099-A (Forgiveness of debt income) <input type="checkbox"/> 1098 (Mortgage interest)	<input type="checkbox"/> Estimated tax payments (dates and amounts paid) <input type="checkbox"/> Real estate taxes <input type="checkbox"/> Other taxes – sales tax paid for auto, boat and RV purchases
Deductions/Adjustments	Other Expenses
<input type="checkbox"/> ROTH IRA contributions <input type="checkbox"/> 5498 - SEP, SIMPLE IRA, Keogh Plans <input type="checkbox"/> 529 Contributions <input type="checkbox"/> Form 1098-E (Student loan interest) <input type="checkbox"/> 1098-T (Tuition statements) <input type="checkbox"/> 1099-INT (Penalty or early withdrawal of savings) <input type="checkbox"/> Alimony paid (Provide recipient name and SS#) <input type="checkbox"/> Moving expenses (Armed forces only) <input type="checkbox"/> Margin interest as reported by brokerage firm <input type="checkbox"/> Cash and non-cash charitable contributions <input type="checkbox"/> Home Energy Efficient Repairs	<input type="checkbox"/> Educator expenses <input type="checkbox"/> 5498-SA (Health Savings Account contributions) <input type="checkbox"/> Energy or vehicle tax credit information <input type="checkbox"/> Business expenses of reservists, performing artists, and fee-based government officials and partners and S Corp shareholders <input type="checkbox"/> Unreimbursed employee expenses <input type="checkbox"/> State/local income taxes (amount & date paid) <input type="checkbox"/> Form 1098 (real estate taxes, home mortgage interest, mortgage insurance premiums) <input type="checkbox"/> Personal property taxes
Children & Child Care	Medical Expenses
<input type="checkbox"/> Child Care expenses <input type="checkbox"/> Name of provider, address, EIN, amt. paid <input type="checkbox"/> Legal papers for adoption, divorce or separation that involves custody of dependent children	<input type="checkbox"/> Self-employment health insurance <input type="checkbox"/> 1095-A, 1095-B, 1095-C <input type="checkbox"/> HSA Expenses & Contributions (1099-SA, 5498-SA) <input type="checkbox"/> Out-of-pocket medical expenses