



Tax Preparation Checklist

This check list is a guide to ensure that you will have all documents necessary to complete your 2021 Tax Returns. If the information is needed by the preparer and any required documents are missing when being completed it could result in you not receiving your completed return within a timely manner.

Personal Information

- Social Security Cards for **ALL** included on the returns, Driver's License, State ID, Birth Certificates, Death Certificates, Marriage license or Divorce Decree
- Copies of last year's tax return (If you are a new client)
- Second form of identification (Passport, Military ID, Credit/Debit Card etc.)

All Income Received

- W-2 forms for you and your spouse
- 1099-G forms for unemployment income, or state or local tax refunds
- 1099-MISC forms
- 1099-R, Form 8606 for payments or any distributions from IRAs or retirement plans
- 1099-S forms for income from purchase or sale of a property if in the tax year
- 1099-INT, -DIV, -B, or K-1s for investment or interest income
- SSA-1099 for Social Security benefits received
- Spousal Support/Alimony received
- Business or farming income - profit/loss statement, all equipment information
- Rental property income and expenses: profit/loss statement, suspended loss information
- Pension Statements
- 1099-C forms for cancellation of debt
- Miscellaneous income: Gambling winnings, Medical Savings Account, scholarships, etc.

Income Adjustments

- Form 1098-E for student loan interest paid (or loan statements for student loans)
- Form 1098-T for tuition paid
- IRA contribution documents or statements of payments made
- Receipts for qualifying home improvements (solar, windows, roof, furnace etc.)
- Medical Savings Account (MSA) contributions
- Self-employed health insurance payment statements
- Moving expenses related to job relocation
- Spousal/Alimony payments
- Any self-employed pension plans
- 1095-A Marketplace Health Insurance and/or all documentation relating to
- Health Insurance

Deductions and Credits

- Child care cost information including provider's name, address, phone number, tax ID, and amount paid
- Education costs: Form 1098-T, education expenses, supplies purchased and receipts
- Adoption costs which include SS Card of child; legal records (adoption documents and Birth Certificate)
- Form 1098 stating Mortgage interest paid for tax year
- Any investment expenses
- Any charitable donations which can include cash donations, original charity donation receipts, receipt stating value of donated items
- Medical and dental expense records (the total amount of these costs in conjunction with yearly income that is needed to determine if the costs are tax deductible is a factor whether those costs are a feasible tax deduction)
- Certain losses in relation to theft or property devastation which include cost of damage receipts, insurance reimbursements and all other related documentation

- Receipts or statements showing amounts of a business owner/self-employed (subcontractor) which could include uniforms/clothing needed for job, supplies, seminars, or necessary education, advertising, mileage, mobile phone payment amounts, employee expenses
- All receipts/documentation of home business expenses, home size/office size, utility payments and all stated above. All receipts must be categorized and totaled as well as any statements and/or excel spread sheet entries. *If tax preparer does any additional work besides the entering of any totals, an additional fee will apply.*
- All Rental Property income/expenses as well as profit/loss statements

Taxes Paid

- Any Real Estate taxes
- License fees if business owner or subcontractor, for all vehicles and/or equipment purchased and used for business purposes

Other Information

- Any Estimated Tax payments made during the year if individual, business owner or self-employed
- All applicable foreign bank account information including location, name of bank, account number and end-of-year statements if received.
- Any documentation in regards to federal or state aid received due to the Pandemic Recovery Rebate Credit (Stimulus monies), Child Tax Credit (CTC) payments, (Paycheck Protection Program (PPP) Loans, Shuttered Venue Operators (SVO) Grant Program, COVID-19 Economic Injury Disaster Loan or EIDL, Local Initiatives Support Corporation or the LISC, GoFundMe Small Business Relief Fund, LISC Small Business Relief Grant or any other Pandemic Relief Aid for businesses.
- Letters or documents received from the IRS stating the amount(s) of stimulus you received in 2021.

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