

Tax Prep Checklist

Please collect the following information (when applicable) and include with your hard copy tax documents.



For questions, call
920-563-6562
 or email
recpt@forttaxservice.com

ALL CLIENTS

Name	* Copy of driver's license (<i>taxpayer and spouse, if applicable</i>)
CURRENT address	Dependents (<i>if applicable</i>)
Email	Primary Phone Number
Newly Married or Divorced in 2021, provide date	

NEW CLIENTS

* Copy of social security cards for <i>EVERYONE</i> (including dependents) listed on tax return	Date of birth for <i>EVERYONE</i> (including dependents) listed on tax return
* Copy of last two year's tax returns	* Copy of driver's license (<i>taxpayer and spouse, if applicable</i>)

*** NEW FORMS FOR 2021 ***

- IRS Notice 1444 C OR Notice 6475 (Stimulus)
- IRS Letter 6419 (Advance Child Tax Credit)

INCOME & DEDUCTIONS

* W2's from all employers	* Charitable contributions and cash donations
* 1099 forms -Unemployment 1099 G, 1099 INT, 1099 DIV, 1099 B,HSA 1099 SA, 1099 Brokerage Statement	Medical expenses (including mileage)
Health insurance premiums (paid out of pocket)	Social security statements

IF YOU OWN A PERSONAL RESIDENCE

* Mortgage interest (Form 1098)	* Real estate taxes paid
* Closing documents if you bought, sold or refinanced a home	

IF YOU OWN RENTAL PROPERTY (not typical)

Rental income	Insurance premiums
Receipts for all expenses (<i>by category</i>)	Real estate taxes paid
Mileage for repairs, inspections, etc.	Loan/Mortgage interest

IF YOU OWN A BUSINESS OR FARM (not typical)

Tax ID #: _____	12/31/21 bank balances
List of capital assets and equipment (<i>purchased & sold</i>)	Business use of home info, if applicable
Business income and expenses	Mileage log

OTHER (some areas not typical)

Do you rent? How much? ____ Is heat included? Y or N	Did you purchase or sell any virtual currency
Did you make any IRA contributions	Sales tax from vehicle purchase
* Educational expenses - loan interest, tuition, private school tuition, and supplies	* Marketplace Health Insurance (1095-A) (1095B or 1095 C forms are not needed)
* Cancellation of Debt (1098-C)	Long-term care premiums
* Gambling Income	Hobby income
IRA Contribution	* Jury Duty
Child Care Expense and address (with Tax ID # or SSN of caregiver)	Estimated tax payments. How much paid and the date
Alimony paid or received	Check, Cash, Debit or Charge are acceptable options for payment. Or, taken from your refund (<i>for an additional fee</i>)?
If you are getting a refund, how would you like to receive it: MAILED CHECK or DIRECT DEPOSIT (<i>savings or checking</i>)	How would you like your tax return? PAPER COPY or PORTAL (PDF) COPY

* Hard copy forms are required, if applicable to you (portal copies are acceptable as hard copies)