



TAX PREP CHECKLIST

FILING STATUS

<input type="checkbox"/>	Married Filing Joint	
<input type="checkbox"/>	Married Filing Separate	
<input type="checkbox"/>	Single	If divorced, provide divorce date: _____
<input type="checkbox"/>	Head of Household	

EVERYONE

<input type="checkbox"/>	Full name, SSN, DOB, e-mail and Driver's License & Phone Number (<i>required</i>)	Charitable contributions and donations
<input type="checkbox"/>	Copy of last year's return (<i>new clients only</i>)	Medical expenses (including mileage)
<input type="checkbox"/>	W2's from all employers	Health insurance premiums
<input type="checkbox"/>	1099 forms for all other income or benefits	Social Security Statement
<input type="checkbox"/>	Stimulus Income (Notice 1444)	Unemployment
<input type="checkbox"/>	Jury Duty	

IF YOU OWN A PERSONAL RESIDENCE

<input type="checkbox"/>	Mortgage Interest (Form 1098)	Real estate taxes paid
<input type="checkbox"/>	Closing documents if you bought/sold or refinanced your home during the year	

IF YOU OWN RENTAL PROPERTY

<input type="checkbox"/>	Rental income	Insurance premiums
<input type="checkbox"/>	Receipts for all expenses	Real estate taxes paid
<input type="checkbox"/>	Mileage for repairs, inspections, etc.	Mortgage interest

IF YOU OWN A BUSINESS OR FARM

<input type="checkbox"/>	Tax ID #: _____	12/31/20 bank balances
<input type="checkbox"/>	List of capital assets and equipment	Business use of home info, if applicable
<input type="checkbox"/>	Business income and expenses	Mileage log
<input type="checkbox"/>	Quarterly taxes paid	

OTHER

<input type="checkbox"/>	Retirement plan contributions	Sales tax from vehicle purchase
<input type="checkbox"/>	Educational expenses - loan interest, tuition, and supplies	Marketplace Health Insurance (1095-A)
<input type="checkbox"/>	Cancellation of Debt (1098-C)	Long-term care premiums
<input type="checkbox"/>	Gambling Income	Stock Sales (Form 1099-B)
<input type="checkbox"/>	IRA Contribution	Hobby income
<input type="checkbox"/>	Child Care Expense (with Tax ID # or SSN of caregiver)	

If you have any questions, please call us at (920) 563-6562