

Tax Preparation Checklist

* New Clients: Photo I.D. for adults; Social Security Cards for all.
* New Clients: Copy of prior year federal and state tax returns.
* Health Insurance: 1095 Form
* W-2 Forms
* Interest & Dividend Income: 1099-INT, 1099-DIV
* Investment Income/Securities Transactions: 1099-B
* State and Local Income Tax Refunds: 1099-G
* Unemployment Compensation: 1099-G
* Business Income and Expenses: 1099-NEC, Income & Expenses, Equipment/Asset List.
* Home Office (Business Owners Only): Square footage of home, square footage of office.
* Business Miles: Total Business Miles Driven, Total Miles Driven; Make & Model of Vehicle
* Employment Taxes Paid During Year
* Quarterly Estimated Tax Payments (if applicable)
* 1099-R and SSA-1099 for Retirement Distributions and Social Security
* Mortgage Interest Paid: Form 1098
* Property Taxes Paid
* Medical Expenses, Including Health Insurance Premiums, Dental, and Optical Expenses.
* Charitable Contributions & Unreimbursed Volunteer Expenses
* Education Info: Student Loan Interest Paid (1098-E), Tuition & Fees (1098-T)
* IRS Letter 6475 reporting Stimulus Payment received in early 2021 (or exact amount from bank records)
* Information on cryptocurrency income/losses/trades

Note: This is a preliminary list. Additional items will be requested as needed.