

Individual Income Tax Checklist of Important Items

** NEW IRS form 6419 showing Advance Child Tax Credit Payments
** NEW IRS form 6475 showing Economic Income Payment of 1400.00 received
Signed Engagement Letter – Required
Completed “Questions” pages from organizer – Required
Review and update personal information section from organizer – Required
Bank Account Authorization form required annually for direct deposit of refunds
Due Diligence Form, if claiming dependents**provide form 8332 if you clam a child that does not live with you
Medical Insurance form 1095 A; Marketplace coverage & Premium Tax Credit
W-2 Forms and final paystubs
Interest and dividend income/1099-INT/1099-DIV (Brokerage Statements)
Statements on the sales of stocks or bonds/1099-B
Pension, retirement, Social Security income/1099-R/SSA-1099
Alta settlement statement from purchase, sale or refinance of real estate in 2021
Other Income: Unemployment income/1099-G, Gambling Winnings/W2-G
Amounts contributed to 529 plan along with December Statements
College expenses: Stmt of Account showing charges billed / payments made &1098-T (Required)
Student Loan Interest Paid, Form 1098E
Medical and dental expenses, (> 7.5% of AGI)
Real estate and personal property taxes (subject to \$10,000 Limit)
Mortgage Interest (Form 1098)
Home Equity / 2 nd Mortgage (note if any used for <i>other than</i> buy build or improve primary residence)
Cash and non-cash charitable donations
H.S.A. Contributions (form 5498SA) / Distributions (1099SA)
Estimated taxes amounts and dates paid , both Federal and State
Self-employment business income and expenses/1099-MISC/NEC
Rental income & expenses (Alta settlement statement if sold or bought new)
Child Care Expenses and provider information
IRA Contributions(Roth or Regular) / Educator Expenses
Forms K-1 for Corporations, Partnerships, LLC’s, Estates and Trusts