

CLIENT TAX CHECKLIST

ALL CLIENTS	
<input type="checkbox"/> Proof of Health Insurance if bought through ACA Exchange (form 1095-A)	<input type="checkbox"/> Real Estate Taxes (may be on 1098 form)
<input type="checkbox"/> All W-2, 1099 & 1098 forms	<input type="checkbox"/> Medical Expenses (out-of-pocket), if applicable
<input type="checkbox"/> Interest & Dividend Income (1099-INT, 1099-DIV)	<input type="checkbox"/> Sales Tax Paid (auto, boat, other big-ticket items)
<input type="checkbox"/> Pension & IRA/Retirement Income (1099-R)	<input type="checkbox"/> Estimated Taxes Paid: Amounts/Dates Federal & State(s)
<input type="checkbox"/> Gambling Winnings (W-2 G FORM) & Losses	<input type="checkbox"/> Form 1444 – Covid19 Stimulus Payments
<input type="checkbox"/> Soc. Security / Unemployment (1099-SSA /1099-G)	<input type="checkbox"/> Purchase/Sell/Refinance Residence: Settlement Papers (HUD Papers) <i>for each transaction</i>
<input type="checkbox"/> Alimony Received or Paid (<i>does not include child support – also need divorce decree</i>)	<input type="checkbox"/> Charitable Donations: Totals & Receipts (<i>up to \$300 even if you do not itemize</i>)
<input type="checkbox"/> State/Local Refunds or Amount Due-Payments Made for Prior Year	<input type="checkbox"/> Energy Tax Credits (<i>\$500 Lifetime Limit</i>) Receipts for: Furnace • A/C • Windows • Doors • Insulation Water Heater • Solar
<input type="checkbox"/> Partnership, S-Corp, Trust or Estate Income (K-1 - ALL PAGES)	<input type="checkbox"/> NEW BABY: Original Soc. Sec. Card
<input type="checkbox"/> Stock Purchase & Sale Cost/Dates (Realized Gains Report)	<input type="checkbox"/> NEW SPOUSE: Original Soc. Sec. Card & Prior Year's Tax Return
<input type="checkbox"/> Education Expenses/Student Loan Interest (1098-T required for tax credits; 1098-Q)	<input type="checkbox"/> Driver's License (You, spouse)
<input type="checkbox"/> Child Care Expenses: Provider Name, Address, SSN/EIN#, amount paid per provider <i>for each child</i>	NEW CLIENTS ONLY
<input type="checkbox"/> Legal Documents: Divorce, Adoption, Death, Trust	<input type="checkbox"/> Prior Year's Tax Return(s)
<input type="checkbox"/> Personal Property Tax Paid on Vehicles, Boats, Trailers	<input type="checkbox"/> ALL Social Security Cards included on the return
<input type="checkbox"/> Mortgage Interest Paid (1098)	<input type="checkbox"/> Birthdate Info (you, spouse, dependents)



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