CLIENT TAX CHECKLIST

ALL CLIENTS	
☐ Proof of Health Insurance if bought through ACA Exchange (form 1095-A)	☐ Real Estate Taxes (may be on 1098 form)
☐ All W-2, 1099 & 1098 forms	☐ Medical Expenses (out-of-pocket), if applicable
☐ Interest & Dividend Income (1099-INT, 1099-DIV)	☐ Sales Tax Paid (auto, boat, other big-ticket items)
☐ Pension & IRA/Retirement Income (1099-R)	☐ Estimated Taxes Paid: Amounts/Dates Federal & State(s)
☐ Gambling Winnings (W-2 G FORM) & Losses	☐ Letter 6475– Covid19 Stimulus Payments
☐ Soc. Security / Unemployment (1099-SSA /1099-G)	☐ Purchase/Sell/Refinance Residence: Settlement Papers (HUD Papers) <u>*for each transaction*</u>
☐ Alimony Received or Paid *(does not include child support – also need divorce decree)*	☐ Charitable Donations: Totals & Receipts *(up to $600 even if you do not itemize)*
☐ State/Local Refunds or Amount Due-Payments Made for Prior Year	☐ Energy Tax Credits (*$500 Lifetime Limit*) Receipts for: Furnace • A/C • Windows • Doors • Insulation Water Heater • Solar
☐ Partnership, S-Corp, Trust or Estate Income (K-1 - <u>**ALL PAGES**</u>)	☐ Letter 6419 – Advance Child Tax Credits Received
☐ Stock Purchase & Sale Cost/Dates (Realized Gains Report)	☐ NEW BABY: Original Soc. Sec. Card
☐ Virtual Currency Transaction Detail (Realized Gains Report or Mining/Staking Detail)	☐ NEW SPOUSE: Original Soc. Sec. Card & Prior Year's Tax Return
☐ Education Expenses/Student Loan Interest (1098-T required for tax credits; 1098-Q)	☐ Driver's License Copy (you, spouse)
☐ Child Care Expenses: Provider Name, Address, SSN/EIN#, amount paid per provider <u>*for each child*</u>	***NEW CLIENTS ONLY***
☐ Legal Documents: Divorce, Adoption, Death, Trust	☐ Prior Year's Tax Return(s)
☐ Personal Property Tax Paid on Vehicles, Boats, Trailers	☐ ALL Social Security Cards included on the return
☐ Mortgage Interest Paid (1098)	☐ Birthdate Info (you, spouse, dependents)

TaxesPlus

5931 Nieman Rd, Suite 200
Shawnee KS 66203
Phone 913-432-3147 Fax 913-722-4653