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Tax Prep Checklist

What you need to bring to file your taxes

New Address in 2021? If so, please check on the line: _____ Your Phone Number _____

It is tax time again! As always, your personal information is completely confidential, and it is never shared with others.
 Note: We do not extend credit. **Please plan to pay by credit or debit cards, check, or cash when your return is completed.**
 Bring a copy of your 2021 return, **if** we didn't prepare your return last year. Bring a Year-to-Date Pay Stub (YTD Totals). We are required to E-file all returns. Please have your bank info/checking account number ready.

YOUR OCCUPATION: _____ Birthdate _____; SPOUSE'S OCCUPATION: _____ Birthdate: _____

PARENTS: If you wish to claim a child who has a W-2, please have them mark the box on Line 5 of the 1040-EZ Form.

DEPENDENTS (Other than spouse or self):

Name (First, Last)	Age @ year end	Social Security No.	Relationship	Birthdate

1040-ES (Estimated Tax): 4/15/2021 \$ _____; 6/15/2021 \$ _____; 9/15/2021 \$ _____; 1/15/2022 _____

INCOME: Items to have ready: W-2s, Interest, Dividends, Pension/Retirement/IRAs, Rental Information, Sale of Property, Business Income, Alimony, Lottery & Bingo Winnings, 1099 Income, Unemployment, etc.

INTEREST EARNED: Bank & Credit Union 1099s, Brokerage Account 1099s, CDs, Property Interest, etc.

Payer Name (Bank, Credit Union, Other)	Amount	Payer Name	Amount

Social Security Benefits: Bring SSA-1099 Form. Amounts: Self \$ _____; Spouse \$ _____

IRA Withdrawals in 2021: Self \$ _____; Spouse \$ _____ Balance in all IRAs (12/31/2021) \$ _____

Unemployment Compensation: Unemployment is reportable as taxable income. Form 1099-UC Totals: \$ _____

SALES/PURCHASES/REFI. If you SOLD or BOUGHT Property in 2020, bring Final HUD-1 Settlement Statement.

- | | |
|--|--|
| _____ SALE of Property
_____ PURCHASE Statement of Property Bought
_____ List & Cost of Permanent Improvements (Non-Residence Property Sold in 2021) | _____ PURCHASE Statement of Sold Property
_____ REFINANCE Closing Statement |
|--|--|

STOCKS or MUTUAL FUNDS If SOLD IN 2021, Bring Cost Basis Statements of Stocks, Mutual Funds Sold.

ADJUSTMENTS & TAX CREDITS

IRAs: Contributions: Self \$ _____; Spouse \$ _____; ROTH IRAs: Self \$ _____; Spouse \$ _____

STUDENT LOAN INTEREST Paid in 2021: \$ _____

EDUCATION: Proof of amount paid for Tuition \$ _____, Books \$ _____, AND Form 1098-T.

HOME ENERGY CREDITS: Some Primary Home Energy Improvements may qualify. Bring description and cost.

CHILD & DEPENDENT CARE: Total Paid in 2021: \$ _____; Number of Children in Day Care: _____

Persons or Organizations who provided Dependent Care

Provider Name	Address (w/zip code)	I.D. # (E.I.N. or S.S.)	Amount