



Quick Tax Checklist

Changes to:

- Name, address, occupation, marital status, phone, email address
- New baby & dependents/Corresponding Social Security Numbers & birthdates
- Direct Deposit Information – Bank name, routing and account Numbers

Income:

- W-2's and/or 1099-MISC, 1099-INT, 1099-DIV, 1099-G (Unemployment/State tax refund)
- Last pay stub
- Amount of stimulus payments received, there were two (April 2020, Jan 2021)
- Tips, commissions received, prizes & awards, jury duty
- Self-Employment/Hobby income & expenses
- Stock and/or bond sales – Form 1099-B
- Rental income and expenses
- Gambling winnings – Form W-2G
- Retirement 1099-R
- Social Security – Form SSA-1099
- Income from Partnerships, S Corporations, Trusts and Estates – Schedule K-1
- Scholarships or Fellowships Received

Other Important Papers and Concerns:

- Investment fees
- Mortgage and/or home equity loan interest paid statements – Form 1098
- Purchase, sale and/or refinance of home – Escrow closing statements, Form 1099-S
- Cash and non-cash charitable contributions
- Child care provider name, address, ID or SS#, amounts aaid
- Alimony paid or received
- Medical, RX, hospital, dental, and eye care expenses
- Health Savings Account 1099-SA
- Real estate and personal property taxes paid
- DMV Fees
- Sales tax paid on large purchases such as car, RV or boat
- Adoption expenses
- Retirement plan contributions
- Estimated tax payments
- Unreimbursed employee business expenses
- Business use of home expenses
- Union & professional dues and Educator expenses
- Job hunting expenses, mileage log for business, charity & medical miles
- Tuition fees & qualified expenses - Form 1098-T
- Student Loan Interest Form 1098-E
- Gambling Losses
- Energy saving home improvements that qualify for tax credits
- Health Insurance – Form 1095-B or Marketplace – Form 1095-A
- Foreign bank account information, foreign assets
- Virtual currency transactions