TAX APPOINTMENT CHECKLIST

We need all the below information as you may take a standard deduction on the Federal return but itemize on the State return.

1. Signed Engagement Letter.
2. Updated Client Information Sheet.
3. Copy of the front and back your current Driver's License (both spouses if filing jointly).
4. Form W-2 wage statements from employers.
5. Form 1099-G Unemployment Income Received Statement
6. Portfolio Income statements (Form 1099-INT - Interest statements, Form 1099-DIV - Dividend statements from investments. Form 1099-B - Statements from broker for stock and/or mutual fund sales. (Also bring original cost and date purchased)
7. Form 1099-K from Venmo, PayPal, or other electronic transfer.
8. Form 1099-R - Pension statements.
9. Form K-1- Statement from partnerships or S-Corporations.
10. Social security statements of income.
11. Form 1095-A to reconcile advance premium tax credits for marketplace health insurance.
12. Rental income & expenses.
13. Business income & expenses.
14. Form 1098 Mortgage interest
15. Real estate taxes paid. (May be reported on the Form 1098)
16. Charitable contributions. (Both cash and non-cash)
17. Estimated tax payments for Federal and State government. We need the amounts and the dates they were paid.
18. Dates of birth and social security cards for your dependents. If you are entitled to the Earned Income Tax Credit, you must also provide proof of residency for all children.
19. Form 1098-T: Tuition Statement. A Form 1098-T is now required to claim any tuition tax benefits.
20. Forms 1099-Q: Distribution from a 529 College Savings Plan, please inform us of any 529 contributions made
21. Student loan interest paid (Form 1098-E) 20 Medical and dental expenses including long term care insurance premiums paid, if any.
22. Documentation for any large purchases (i.e.; car, boat, RV) that you paid sales tax on, including the date purchased.
23. Roth and Traditional IRA, UNI-401(k), SIMPLE Plan, & SEP contributions.
24. 12 months of bank statements for all foreign bank accounts and/or cryptocurrency accounts.
25. Last income tax return filed, if prepared by another preparer.
26. VOIDED blank check, if you would like direct deposit of your tax refund or to be used to pay the IRS/State