

TAX PREP CHECKLIST

Name: _____ Drop off date: _____
 Phone number: _____ Tax preparer: _____
 Email: _____

CHANGES TO PERSONAL INFORMATION

New address

Street Address

City State Zip Code

Change in filing status

- Single Married Head of Household
(if newly married in 2021, you must include copy of spouse's ID and Social Security card)

New dependent – *must include copy of social security card*

Full name: _____

DOB: _____ SSN: _____

New banking information for tax refunds and/or withdrawals

Account no. _____

Routing no. _____

Checking Savings

Other

TAX FORMS AND DOCUMENTS

INCOME & OTHER TAX FORMS

- W-2s and 1099s for all forms of income or investments
- Form K-1 from a business tax return
- Schedule C (self-employment) information, including any short-term gig jobs
- Schedule E (rental) information
- Did you purchase health insurance through the Marketplace? Attach Form 1095-A
- Tuition forms 1098-T and receipts or student loan interest form 1098-E
- Did you receive an Identity PIN letter from the IRS?

ESTIMATED TAX PAYMENTS

| | Federal Estimates Paid | | State Estimates Paid | | City Estimates Paid | |
|-------------------------|------------------------|-----------|----------------------|-----------|---------------------|-----------|
| | Amount | Date Paid | Amount | Date Paid | Amount | Date Paid |
| 1 st Quarter | _____ | _____ | _____ | _____ | _____ | _____ |
| 2 nd Quarter | _____ | _____ | _____ | _____ | _____ | _____ |
| 3 rd Quarter | _____ | _____ | _____ | _____ | _____ | _____ |
| 4 th Quarter | _____ | _____ | _____ | _____ | _____ | _____ |

MANDATORY QUESTIONS

- Yes No Did you receive the third Economic Impact Payment (stimulus payment)? If "Yes," provide Notice 1444-C or Letter 6475 from the IRS that shows the amount of the payment and how it was given.
- Yes No Did you receive advance payments of the Child Tax Credit from the IRS at any time from July through December 2021? If "Yes," provide Letter 6419 from the IRS.
- Yes No Did you receive unemployment benefits for any portion of the year? If "Yes," you must provide Form 1099-G.
- Yes No Did you sell, exchange, or dispose of any virtual currency?
- Yes No Did you have up to \$300 (or \$600 if MFJ) of charitable cash contributions during 2021? If "Yes," provide receipts.

AWKNOWLEDGEMENT

Please thoroughly read the following statements and sign at the bottom to acknowledge and confirm your understanding.

- We will depend on you to provide the information needed to prepare complete and accurate returns.
- We will not audit or otherwise verify the data you submit for fraud or other irregularities.
- Our fee is based on the time required at standard billing rates and is subject to change based on time, number of forms, and/or the complexity of your return.
- We will return your original records at the end of this engagement, which should be stored for up to seven years.
- If you receive an IRS notice regarding this tax year, it must be submitted to us within 14 days of the notice. Additional charges may apply.

Taxpayer: _____ Date: _____