

Taxpayer - First Name: _____ Last Name: _____

Taxpayer: ID #: _____ SSN: _____

Spouse - First Name: _____ Last Name: _____

Spouse ID #: _____ SSN: _____

Mailing Address: _____

Phone Number: _____ Email: _____

Filing Status (circle): Single Married filing jointly Married filing separately Head of Household

Dependents: _____ Fees: _____ PAID NOT PAID

Basics for all filers:

- Driver Licenses or other ID "Passport" with picture for you, spouse, & your dependents.
- SSN for Taxpayer, Spouse & Dependents - COPY.
- Identity Protection Pin if one was issued to you by the IRS
- COPY OF LAST YEAR TAX RETURN
- Childcare Records
- Direct Deposit -Bank: _____ Account# _____ Routing# _____

Employed

- W-2 Forms
- 1099s for all forms of income _____
- Unemployed - (1099-G) Unemployment

Self- Employed

- Records of all EXPENSES
- Office in home information
- Forms 1099, Schedules K-1, income records to verify amounts NOT reported on 1099-MISC or new 1099-NEC
- Auto loan or lease if vehicle used for business

Retirement Income

- Pension/IRA/annuity income (1099-R)
- Traditional IRA basis (i.e., amounts you contributed to the IRA that were already taxed)
- RRB income (SSA-1099, RRB-1099)/Social Security "SS & SSI"

Home Ownership

- Forms 1098 or other Mortgage Interest statements
- Real estate & Personal Property Tax records
- Receipts for energy-saving home improvements (e.g., solar panels, solar water heater)

Rental Income

- 1098s: Interest on mortgage and loans
- Insurance Premiums
- Paid real estate taxes
- Energy efficient upgrade receipts
- Sale records
- Rental income
- Receipts for rental upgrades, repairs, Maintenance, Utilities...

OTHER INCOME

- FIP, DHS _____

Savings & Investments or Dividends

- Interest, dividend income (**1099-INT, 1099-OID, 1099-DIV**)
- Income from stock sales or other property (**1099-B, 1099-S**)
- Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported **on 1099-B**)
- Health Savings Account and long-term care reimbursements (**1099-SA or 1099-LTC**)
- Expenses related to your investments
- Record of estimated tax payments made (Form **1040-ES**)
- Transactions involving **cryptocurrency (Virtual currency)**

Other Income & Losses

- Gambling income (W-2G or Records showing Expense records)**
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Trust income
- Royalty Income 1099-MISC**
- Any other 1099s received
- Record of alimony paid/received with ex spouse's name
- State tax refund

Childcare Expenses

- Fees paid to a licensed day care center or family day care for care of an infant or preschooler**
- Amounts paid to a baby-sitter or provider care of your child under age 13 while you work**
- Expenses paid through a dependent care flexible spending account at work

Educational Expenses

- Forms **1098-T** from educational institutions
- Receipts** that itemize qualified educational expenses
- Records of any scholarships or fellowships you received
- Form **1098-E** if you paid student loan interest

K-12 Educator Expenses

- Receipts for classroom expenses (for educators in grades K-12)

Retirement & Other Savings

- Form **5498-SA** showing **HSA** contributions
- Form **5498** showing **IRA** contributions
- All other **5498** series forms (**5498-QA, 5498-A**)

Medical Expenses

- Amounts paid for healthcare, insurance, doctors, dentists & hospitals

Health Insurance

- Form **1095-A** if you enrolled in an insurance plan through the Marketplace (Exchange)

Charitable Donations

- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Amounts of miles driven for charitable or medical purposes

Federally Declared Disaster

- City/county you lived/worked/had property in
- Records to support property losses (appraisal, clean-up costs, ect)
- Records of rebuilding/repair costs
- Insurance reimbursements/claims to be paid
- Check the FEMA website to see if your county has been declared a federal disaster area. FEMA assistance information

State & Local Taxes

- Amount of state and local income or sales tax paid (other than wage withholding)
- Invoice showing amount of vehicle sales tax paid and / or personal property tax on vehicles
- RENT \$** _____
- Heating Credit**

NOTES:

Recovery Rebate Credit - CLAIM: YES OR NO AMOUNT: \$ _____

Child Tax Credit - CLAIM: YES OR NO AMOUNT: \$ _____