

INCOME TAX CHECKLIST

Taxpayer's name	SSN	
Spouse's name	SSN	
Taxpayer's occupation	Birthdate	Blind?
Spouse's occupation	Birthdate	Blind?
Address		
Phone		
Did you receive, sell, send, exchange or disposed of any financial interest in virtual currency? Y or N		

DEPENDENTS

Name	SSN*	Birthdate	Relationship
1)			
2)			
3)			
4)			

Income	Support by you	Support by others	Months in your home
1) \$	\$	\$	
2) \$	\$	\$	
3) \$	\$	\$	
4) \$	\$	\$	

* You must provide a Social Security number for all dependents.

PAPERWORK TO BRING

_____ W-2s	_____ 1099-INT/DIV	_____ 1099-NECs	_____ ACTC Letter 6419
_____ K-1s	_____ Property tax bill	_____ Last year's tax return	_____ Health insurance coverage information

FOREIGN FINANCIAL ASSETS

Did you have any financial interests (e.g., bank accounts, pensions, stocks, etc.) in a foreign country? Y or N

OTHER INCOME

SALE OF STOCK OR OTHER PROPERTY	Cost	Sales price

If you have other income, please bring all figures and supporting data. Examples:

- Tips _____
- Pensions/annuities _____
- Jury duty _____
- Unemployment (1099-G) _____
- Alimony received* _____
- Prizes (1099-MISC) _____
- Self-employment _____
- Partnerships and S corporations _____
- Estates & trusts _____
- Social Security benefits _____
- Scholarships & fellowships _____
- Tax refunds _____
- Royalties _____
- Nontaxable income _____
- Gambling _____
- Hobby income _____
- Other _____

Please bring supporting documents (Form 1099-Bs and statements)

- If you have a business or rental property, please attach an income/loss statement and supporting documents.
- If you borrow money and the debt is canceled or forgiven, please include Form 1099-A and/or 1099-C.

* Not taxable for divorces commencing after Dec. 31, 2018

Deductions and Credit Items

RETIREMENT

Contributions to a traditional IRA
 Taxpayer Date _____
 Spouse Date _____

Contributions to a Roth IRA
 Taxpayer Date _____
 Spouse Date _____

Penalty for early withdrawal _____

Alimony pd. (can't deduct for divorces commencing after 12/31/18) _____

Keogh, SEP & SIMPLE contributions _____

INTEREST EXPENSE

Home mortgage (1098) _____

Home mortgage – pd. to individuals _____
 (Include name and SSN of individuals)

Mortgage insurance premiums _____

Investment interest** _____

Student loan interest (1098-E) _____

MEDICAL EXPENSES

Medical savings account (MSA) contributions _____

Health savings account (HSA) contributions _____

Insurance & Medicare premiums _____

Prescriptions _____

Eyeglasses _____

Doctors _____

Dentists _____

Hospital _____

Ambulance _____

Medical auto mileage _____

Other medical travel expenses _____

Hearing aids & batteries _____

Other medical expenses _____

Reimbursements _____

Self-employed health insurance _____

CONTRIBUTIONS

Church _____

Other cash contributions _____

Charitable auto mileage _____

Property donated for which you have receipts (fair market value) _____

For 2021, taxpayers using the standard deduction are allowed an above-the-line charitable contribution of up to \$300 for single and \$600 for married.

TAXES

Real estate tax _____

Personal property tax* _____

City/county tax* _____

Sales tax _____

Other* _____

CASUALTY & THEFT LOSSES

The following expenses may only be claimed in a federally declared disaster area.

Cost of property lost _____

Fair market value of property _____

Insurance reimbursement received _____

OTHER ADJUSTMENTS

Moving expenses - Armed Forces members only _____

Gambling losses _____

Educator expenses _____

Estimated taxes	State	Federal
Date pd.		
Date pd.		
Date pd.		
Date pd.		

CHILD CARE EXPENSES – Bring list of monthly totals

Provider's name	Address	ID# of provider(s)	Amount pd.

EDUCATION CREDITS (1098-T)

Name of institution	Tuition pd.	Who attended	When classes began

LOANS: If you borrowed money during the year, bring a list showing the amounts, dates and use of proceeds.

* Taxpayers who itemize can deduct their state individual income, sales and property taxes up to a limit of \$10,000 in total.

** For taxpayers who itemize, your investment interest expense deduction is limited to your net investment income.