

CHECKLIST

Check mark each section that pertains to your tax return.

Attached documentation such as W-2s, 1099s, etc.

Attached detailed sheets with amounts of items such as sales of assets and itemized deductions

Do not send individual receipts unless we request them. Keep them 3 years for records.

General Information

___ Address, e-mail, or phone change. Please list new items here

___ Name change (include a copy of the new social security card)

___ Change of filing status (attached details of marriage, divorce, or date of death)

___ Dependent Addition or Change (include a copy of social security cards and dates of birth)

INCOME

___ W-2s from Employers

___ Retirement Income 1099Rs

___ Social Security Income

___ Interest Income 1099 INT

___ Dividend Income 1099 DIV

___ Unemployment 1099G

___ Stock Sales 1099S

___ Sale of Assets/Bitcoin sale and purchase info req.

___ Miscellaneous Income

___ Health Savings Acct Information

INFORMATION FOR CREDITS and Deductions

___ IRA Contributions

___ Child Care Expenses

___ Early Child Tax Credit (Form 6419)

ITEMIZED DEDUCTIONS

___ Medical Insurance

___ Pharmacy Costs

___ Doctors, Hospital, Dental

___ Medical Equipment/Supplies

___ Medical Miles

___ Auto Licenses

___ Real Estate Taxes

___ Home Mortgage Int 1098

___ Contributions

___ Stimulus amount rec'd

___ College Student Exp (1098-T)

___ Student Loan Payments