

**Karla Sarhan Tax and Accounting Services Inc.**

**1455 Frazee Road, Suite 500**

**San Diego California 92108**

**Ph# 877-288-5577**



## **Checklist**

### **Personal Information**

- Your full name and social security number
- Your spouse's full name and social security number
- Date of Birth for you and spouse
- Driver's license and or permanent resident card photo copy for you and spouse
- If Divorced- Amount of any alimony paid and ex-spouse's social security number
- Add Your prior tax return(s) if you would like your Tax Professional to check them for accuracy

### **Other people who may belong on your return**

- Full name as displayed on social security card
- Dates of birth and social security numbers
- Childcare records (including the provider's ID number) if applicable
- Approximate income of other adults in your home (not spouse, if you're filing jointly)
- Form 8332, copies of your divorce decree, or other documents showing that your ex-spouse is releasing their right to claim a child to you

### **Education Payments**

- Bills from the educational institution or anything else that itemizes what you paid or received loans for versus what was covered by scholarship or other financial aid
- Forms 1098-T and 1098-E, if you received them
- Scholarships and fellowships

### **Taxpayer employment Information**

- Forms W-2, 1099's etc...

### **Spouse employment Information**

- Forms W-2, 1099's etc...

### **Self-Employment Information**

- Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s.
- Records of all expenses — check registers or credit card statements, and receipts
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Office in home information, if applicable

### **Vehicle Information**

- Total miles driven for the year (or beginning/ending odometer readings)
- Total business miles driven for the year (other than commuting)
- Amount of parking and tolls paid
- If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

### **Rental Income**

- Records of income and expenses
- Rental asset information (cost, date placed in service, etc.) for depreciation expense

### **Retirement Income**

- Pension/IRA/annuity income (1099-R)
- Social security/RRB income (1099-SSA, RRB-1099)

### **Savings and Investments**

- Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-S)
- Dates of acquisition and records of your cost or other basis in property you sold

### **Other Income**

- Unemployment, state tax refund (1099-G)
- Gambling income (W-2G or records showing income, as well as expense records)
- Amount of any alimony received and ex-spouse's name
- Health care reimbursements (1099-SA or 1099-LTC)
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Other 1099
- Square sqft utilized for business

### **Itemizing Deductions**

- Forms 1098 or other mortgage statements

- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Real estate and personal property tax records
- Invoice showing amount of vehicle sales tax paid
- HUD statement showing closing date of home purchase
- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- Amounts of miles driven for charitable or medical purposes
- Expenses related to your investments
- Amount paid for preparation of your 2020 tax return
- Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
- Job-hunting expenses
- **IRA Information**
- Amount contributed for 2021 (and 2020, if applicable)
- Form 1099-R etc...
- Traditional IRA basis
- Value of IRAs on Dec. 31, 2021