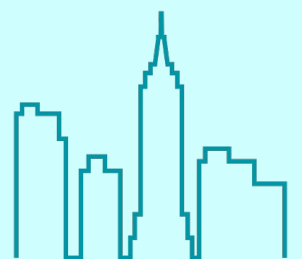


Tax Prep Checklist



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Tax Prep Checklist (Personal Tax Return)

Attach all applicable documents and provide it to your tax preparer

General

- | | |
|---|--|
| <input type="checkbox"/> Full name, SSN & DOB | <input type="checkbox"/> Driver's License |
| <input type="checkbox"/> Copy of Last Year's Tax Return | <input type="checkbox"/> Banking Information (if applicable) |
| <input type="checkbox"/> Dependents' name, SSN & DOB | |

Income

- | | |
|--|--|
| <input type="checkbox"/> W-2s from all employers | <input type="checkbox"/> Schedule C, net income and expenses (if applicable) |
| <input type="checkbox"/> 1099 forms for other income | |
| <input type="checkbox"/> K-1s from business(s) | |

Itemized Deductions, Schedule A

- | | |
|---|--|
| <input type="checkbox"/> Charitable Contributions | <input type="checkbox"/> DMV Registration Fee |
| <input type="checkbox"/> Medical Expenses | <input type="checkbox"/> Unreimbursed Employee Expenses (this is no longer federally applicable but ask your tax preparer if they have other options for you and your situation) |
| <input type="checkbox"/> Mortgage Interest (1098) | |
| <input type="checkbox"/> Property Taxes | |

Rental Property

- | | |
|---|--|
| <input type="checkbox"/> Rental Income | <input type="checkbox"/> Property Taxes |
| <input type="checkbox"/> Rental Expenses | <input type="checkbox"/> Closing Costs (if applicable) |
| <input type="checkbox"/> Mortgage Interest (1098) | |

Other

- | | |
|--|---|
| <input type="checkbox"/> Student Loan Interest | <input type="checkbox"/> Health Care |
| <input type="checkbox"/> Education Credits (1098T) | <input type="checkbox"/> Estimated Tax Payments |
| <input type="checkbox"/> Child Care Expenses | <input type="checkbox"/> Other |

Notes:

Important Due Dates for 2022

(Or tax year 2021)

<i>Personal Tax Returns</i>		Due Date/ Date to File Extension	Extension Due Date
Federal	Form 1040/1040A/1040EZ Includes: Schedule C (Sole Proprietorships/Single Member LLCs)	April 15, 2022	October 15, 2022
State	Each state Has different forms	April 15, 2022	October 15, 2022

<i>Business Tax Returns</i>		Due Date/ Date to File Extension	Extension Due Date
Federal			
S-Corporation	Form 1120S	March 15, 2022	September 15, 2022
Partnerships	Form 1065	March 15, 2022	September 15, 2022
C-Corporation	Form 1120	April 15, 2022	October 15, 2022

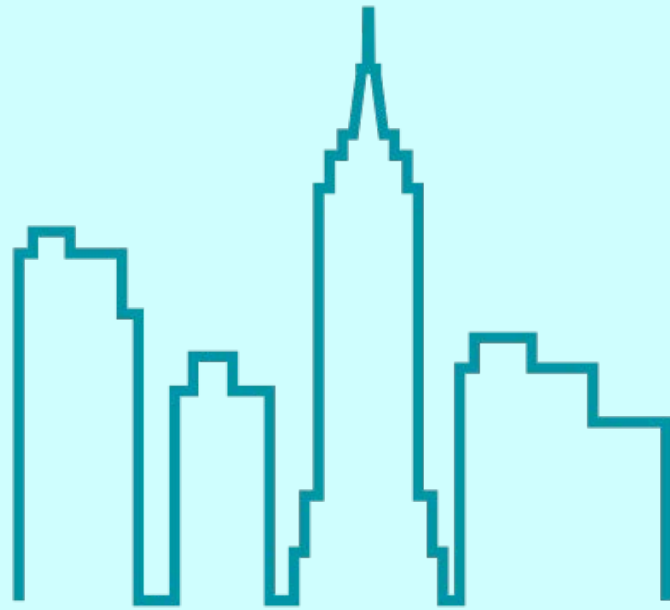
State

Each state has different forms, some states that do not have income tax will not have to file a tax return. If your state does require a tax return, it is best to file both Federal and state returns at the same time.

****Please note: if you owe on your tax returns, filing an extension does not extend the time to pay. The balance that is owed is still due on the original due date (not on the extended due date)****

<i>Other Business Forms</i>		Due Date
Form 1099-NEC "Non-Employee Compensation" -usually for outside services or Independent contractors. (paid \$600 or more)	Filed Electronically to IRS Filed Paper to IRS Filed to Recipients	March 31, 2022 February 1, 2022 February 1, 2022

****NOTE: These are approximate dates based on the past years, due to Covid-19 these dates may be postponed****



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