

2021 CHECKLIST FOR ACCURATAX LLC

Name _____ Social Security No. _____

Address _____ City _____ Zip _____

Phone _____ Email _____ Email _____

(If married or have a significant other need email for each to DOCUSIGN)

Banking Info DD: Name _____ Routing _____ Acct _____

1) Did you trade Virtual Currency / BitCoin _____ Foreign Acct _____

2) Amount of 3rd Stimulus Received 1) _____
(Note - this should be \$1400 x No of Family Members)

SECTION ONLY FOR CLIENTS WITH DEPENDENT CHILDREN

Names & dates of birth of all household dependents/members:

Name _____ DOB _____ Name _____ DOB _____

Name _____ DOB _____ Name _____ DOB _____

3) Did you receive advance child tax payments? Yes ___ No ___
Total Amount Received _____ Verified _____

(Note - you should receive a 6419 form with amount received)

A) Did your dependents live with you all year _____ Half Year _____

B) Could anyone else claim your children _____

C) Proof your dependent? _____ Healthcare Provider _____ School Record
_____ Childcare Provider Statement _____ Medical Records _____ Other
(Please list other proof _____)

D) Have you ever been rejected any IRS child credits? ___ No ___ Yes

***NEW CLIENTS ONLY - NEED A COPY OF 2020 TAX RETURN

Income and deductions

___ W2 Forms (Wages)

___ 1099 MISC (Contract Work)

___ 1099-INT or December Bank Statement (Banking Interest)

___ Last year's State Refund Card

___ Unemployment (Form 1099-G)

___ Retirement Benefits (1099-R)

___ Social Security Benefits

___ Alimony received

___ Daycare expenses

___ College Education loan interest

___ College Education Expenses for dependents (1098T and books/materials)

___ Educators Credit (Limit of \$250 school supplies)

___ \$300 of Contributions is deductible in 2020

IF YOU ITEMIZE (Standard MFJ \$25,100, Single \$12,550) (Over 64 \$14,250 \$26,450)

___ 1098 (House Interest)

___ Property taxes (2020 taxes paid in 2021)

___ New Vehicle Purchase in 2021 (Please supply sale receipt)

___ Cash contributions paid to Non-Profits

___ Gift contributions given to Non-Profits

___ Medical Expenses - (ONLY Out of Pocket) NOTE: CANNOT BE FUNDS PAID BY HSA.

___ Long Term Care Payments

STOCK, MUTUAL FUNDS, or IRA's

1099-B if you sold mutual funds or stock (Need Sell & Buy amounts)

1099-DIV if you receive dividends from Mutual Funds or Stock

IRA Contributions for 2020 (Don't need Roth Information)

HSA Contributions and Distubutions for 2021 (Individual or Family)

HEALTH INSURANCE INFORMATION (OBAMACARE)

Was the complete family covered by a health insurance policy? Yes No

NOTE: If you used the Marketplace you need Form 1095-A must be provided to complete your return.

ADDITIONAL QUESTIONS

	Yes	No
Did you receive any correspondence from the IRS? If yes please supply a copy of the letter.	<input type="checkbox"/>	<input type="checkbox"/>
Did you sell or buy a home during 2021?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a new address?	<input type="checkbox"/>	<input type="checkbox"/>
If yes: Address _____ City _____ State _____ Zip _____		

Do you have any new dependents in 2021?
If Yes: Name _____ Soc Security _____ DOB Birth _____

Additional Notes or Client Questions:

Rental Property Address _____

Number of Days Rented

Rent Received

Miles driven

Property Insurance

Rental Mortgage Interest

Repairs

Supplies

Rental Property Taxes

Rental Property Insurance

Utilities Paid by Owner

HOA

Depreciation - (need Closing statement if purchase in 2016)

Capital Improvements (Please List Improvement and Total Cost)

NOTE: If purchased this year will need a copy of the purchase statement.

Additional Notes:

Rev C

AccuraTax LLC Tax and Bookkeeping

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