Go to **WWW.TAXOFFICEFORMS.COM** TO MAKE AN APPOINTMENT

ITEMS NEEDED TO COMPLETE YOUR 2021 PERSONAL INCOME TAXES THIS YEAR

**STIMULUS AND CHILD TAX CREDIT**

HOW MUCH DID YOU RECEIVE FOR THE 3RD STIMULUS? YOU CAN STILL RECEIVE IT IF YOU QUALIFY OR IF YOU DIDN’T GET THE CORRECT AMOUNT. □ BRING IN IRS NOTICE 1444-C: YOUR ECONOMIC IMPACT PAYMENT.

AMOUNT OF ADVANCE CHILD TAX CREDIT RECEIVED IN 2021 (□BRING IN IRS NOTICE 6419 TO RECONCILE OR REFUND WILL BE HELD UP FOR MONTHS).

IF YOU DON’T HAVE EITHER OF THE FORMS, GO TO IRS.GOV/ACCOUNT TO SET UP YOUR ACCOUNT TO GET THE REQUIRED FORMS.

**INCOME**

□ W-2 FROM ALL EMPLOYERS: BRING LAST PAYCHECK FROM 2021 (IF AVAILABLE) AND TIPS NOT ON W-2

□ W-2G FOR ALL GAMBLING WINS. GET WIN/LOSS STATEMENTS FROM CASINO(S).

□ 1099-INT, 1099-DIV: SHOWING INTEREST AND DIVIDEND INCOME

□ 1099-R FOR ANY RETIREMENT MONEY RECEIVED

□ 1099-SSA FOR SOCIAL SECURITY BENEFITS RECEIVED (RED & WHITE FORM)

□ 1099-G FOR ANY STATE UNEMPLOYMENT BENEFITS YOU RECEIVED

□ 1099-G FOR ANY OTHER STATE INCOME TAX REFUNDS

□ 1099-B FROM INVESTMENT COMPANIES FOR SALE OF STOCK

□ 1099-MISC AND ANY OTHER INCOME

□ 1099-C FOR CANCELLATION OF INCOME

□ K-1 FROM PARTNERSHIPS, S-CORPS OR TRUSTS

□ BUSINESS INCOME AS A SOLE PROPRIETOR-SUMMARIZE EXPENSES, MILEAGE

□ RENTAL INCOME SUMMARIZE EXPENSES BY PROPERTY AND CATEGORY

□ ALIMONY RECEIVED FROM PRE 2019 DIVORCE

□ SALE OF VIRTUAL CURRENCY (I.E. BITCOIN)

**ADJUSTMENTS AND DEDUCTIONS**

□ MEDICAL EXPENSES (IF GREATER THAN 7.5% OF YOUR INCOME IF YOU ARE ITEMIZING)

□ SALES TAX ON NEW AUTO PURCHASE. BRING SALES STATEMENT

□ 1098-MORTGAGE STATEMENT ON ALL PROPERTIES

□ CASH CONTRIBUTIONS: CAN DEDUCT UP TO $300/SINGLE OR $600/MARRIED WITHOUT ITEMIZING

□ FORM 1095-A (REQUIRED) FROM HEALTH EXCHANGE IF YOU HAVE ACA (OBAMA CARE)

□ STUDENT LOAN INTEREST PAID IN 2021

□ 1098-T FOR VALUABLE EDUCATION CREDITS. MUST GET 1098-T FOR STUDENT from school account.

□ CHILD CARE AMOUNTS PAID WITH PROVIDERS NAME, ADDRESS AND TAX ID

□ SOLAR ENERGY COSTS ON PERSONAL RESIDENCE. You must have MANUFACTURERS CERTIFICATE.

□ IRA CONTRIBUTIONS CAN CONTRIBUTE UP TO APRIL 18TH for 2021.

□ ESTIMATED TAX PAYMENTS-FEDERAL AND STATE- DATES AND AMOUNTS PAID

□ BRING SOCIAL SECURITY CARDS FOR NEW DEPENDENTS IF NOT COPIED BY THIS OFFICE PREVIOUSLY

TEL: 702.259.1040 FAX: 702.870.6817 EMAIL: TAXOFF@AOL.COM

For better identity protection get an annual IP PIN at www.irs.gov search Get an IP PIN.

We will take responsibility for filing an extension of time to prepare you income tax return only if you receive a written response from us acknowledging our acceptance of your request that we do so.

It is a taxpayer’s responsibility to maintain organized documentation of the income and deductions claimed on a tax return. Documentation includes, but is not limited to, records on income received, receipts and proof of payment for deductions indicating purpose, mileage logs, gambling logs, and a general ledger for business income and deductions.

We cannot share your information with a third party unless you provide written consent in accordance with federal law.