

TAX PREPARATION CHECKLIST

Personal Information		Document Checklist		Filing Status	
First Name		Copy of Drivers License		Single	
Last Name		W2		Married Filing Jointly	
SSN		1099 Non Employee Compensation		Married Filing Separately	
Date of Birth		1099 Misc Revenue		Head of Household	
Phone #		1099 Retirement		Qualified Widower	
Email		1099 Interest			
		1099 Mortgage			
Spouse Information				Stimulus Information	
First Name		1099 Unemployment		1st (2020) Tax Year \$1,200 Max per Adult \$500 Max per Dependent	
Last Name		1099 Dividend		2nd (2020) Tax Year Max \$600 per person living in household	
SSN		1095 Health Care		3rd (2021) Tax Year Max \$1,400 per person living in household	
Date of Birth					
Phone #		Rental Income			
Email		Income/Expenses			
		Schedule C (Sole Prop or LLC)			
		Bookkeeping (Revenue/Expenses)		Other	
				Education	
		Address		Student Loan Interest	
Street				Medical	
City					
State				Pre-Tax Payments (Date/Payment)	
Zip Code				Q1 Federal	
				Q2 Federal	
				Q3 Federal	
				Q4 Federal	
				Q1 State	
				Q2 State	
				Q3 State	
				Q4 State	
Dependent 1		Dependent 2			
First Name		First Name			
Last Name		Last Name			
SSN		SSN			
Date of Birth		Date of Birth			
Dependent 3		Dependent 4			
First Name		First Name			
Last Name		Last Name			
SSN		SSN			
Date of Birth		Date of Birth			
				Disposition(s)	
				Property	
				Stocks	
				Bonds	
				Passthrough Income	
				K-1	