

Personal Information	
First Name	
Last Name	
SSN	
Date of Birth	

Spouse	
First Name	
Last Name	
SSN	
Date of Birth	

Dependent 1	
First Name	
Last Name	
SSN	
Date of Birth	

Dependent 2	
First Name	
Last Name	
SSN	
Date of Birth	

Dependent 3	
First Name	
Last Name	
SSN	
Date of Birth	

Dependent 4	
First Name	
Last Name	
SSN	
Date of Birth	

Document Checklist	
Copy of Drivers License	
W2	
1099 Non Employee Compensation	
1099 Misc Revenue	
1099 Retirement	
1099 Interest	
1099 Mortgage	
1099 Unemployment	
1099 Dividend	
1095 Health Care	

Rental Income	
Income/Expenses	

Schedule C (Sole Prop or LLC)	
Bookkeeping (Revenue/Expenses)	

Disposition(s)	
Property	
Stocks	
Bonds	

Passthrough Income	
K-1	

Filing Status	
Single	
Married Filing Jointly	
Married Filing Separately	
Head of Household	
Qualified Widower	

Stimulus Information	
1st (2020) Tax Year \$1,200 Max per Adult \$500 Max per Dependent	
2nd (2020) Tax Year Max \$600 per person living in household	
3rd (2021) Tax Year Max \$1,400 per person living in household	

Other	
Education	
Student Loan Interest	
Medical	

Pre-Tax Payments (Date/Payment)	
Q1 Federal	
Q2 Federal	
Q3 Federal	
Q4 Federal	
Q1 State	
Q2 State	
Q3 State	
Q4 State	