

Computer Tax & Accounting
303-761-1733
Checklist for your Tax Appointment

IRS Stimulus letters 6475

Changes

Filing Status (Marital Status)
Address (buy\sell -- settle stmt)
Dependents
Career
Life Changes
Job Changes

Income Bring All 1099s

Wages W-2
Interest 1099 INT
Dividends 1099 DIV
Small Business 1099 MISC
Capital Gains & Losses 1099B
Pension 1099R
IRA Distributions 1099R
Rents/Royalties 1099 MISC
Partnership/Corp interests K-1
Unemployment 1099 G
Social Security 1099 SSA
Gambling W-2G
Other Income Items?

Adjustments

Educator Expenses
IRA/Sep contributions
Reservist/Perf. Art Expense
Student Loan Interest Paid
Alimony Paid
Moving Expenses
Tuition & Fees
HSA Contributions
Early Withdrawal Penalty

Higher Education

College/Trade School Students?
Tuition Paid
Education Saving Accounts ESA's
QTP Qualified Tuition Program

Medical

Doctors
Insurance
Lab Work
Travel Mileage, Airfare
Prescriptions
Eyes, Ears, etc.

Taxes

State Tax Paid
Real Estate (Bring In)
Head Tax/ Local Tax
Own Tax (On Car Registration)
Sales Tax (Big Purchases)

Mortgage Interest

Re-Finance?
Bring Settlement Stmt or
Closing disclosure
1st & 2nd Mortgage
Vacation/ Time Share
RV, Houseboat, Land
MIP (Mortgage Insurance)

Investment Interest

Property Loans
Margin Loans

Retirement

IRA
IRA Withdrawals
Roth IRA
401K, 403B, 408K, 457

Opportunity/ Lifetime

Qualifying Family Member
Tuition, and Req. Supplies
Including Computer & Books

IRS Adv Tax Credit 8812

Donations

Churches/Charities
Cash/ Non-cash
Property/Stock
Charitable Mileage
Out of Pocket
Schools/ Non Profit

Casualty/Theft

Only if >10% of Income
Disaster Area Exceptions
To the 10% Deductible

**Work Related Exp
No longer deductible**

Cell Phone
Business Mileage
Out of Pocket
Bus. Travel/Entertain.
Home Office
Job Hunting

Child Care Credit

Daycare Providers
Tax ID# or Social Security
Number and Address

Credits

Retirement Savings Ctrb.
Child Tax Credit
Adoption Credit

QBI Deduction

= 20% deduction
Almost all small bus
Qualifies

Estimated Tax Paid

Federal and State

We look forward to seeing

303-761-1733 for Appt