



TAX GURU, LLC

Professional Taxation Services provided by Accounting Gurus



Tax Preparation Checklist

Personal Information

- Your social security number
- Your spouse's full name and social security number
- Dates of birth and social security numbers
- Stimulus Payment received (3rd)
- Childcare records (including the provider's ID number, address and amount paid)
- Form 1095-A if you enrolled in an insurance plan through the Marketplace(Exchange)
- Child Tax Credit Advance Payment Amount

Education Payments

- Forms 1098-T and 1098-E, if you received them
- Scholarships and fellowships

Employee Information

- Forms W-2

Self-Employment Information

- Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s
- Records of all expenses — check registers or credit card statements, and receipts
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Office in home information
- Percentage of work from home

Vehicle Information

- Tax Deductible Miles Traveled for Business Purposes
- Amount of parking and tolls paid
- If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

Rental Income

- Records of income and expenses
- Rental asset information (cost, date placed)

Retirement Income

- Pension/IRA/annuity income (1099-R)
- Social security/RRB income (1099-SSA, RRB-1099)

Savings and Investments

- Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-S)
- Dates of acquisition and records of your cost or other basis in property you sold
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- Expenses related to your investments

Other Income

- Unemployment compensation received
- State tax refund (1099-G)
- Foreign Income (Rental and/or Business)
- Gambling income (W-2G or records showing income, as well as expense records)
- Record of alimony paid/received with ex-spouse's name and SSN
- Jury duty records
- Other 1099

Tax Estimate Payments

- Estimated tax payments made (Form 1040-ES)
- Last Year's tax return over-payment

Itemizing Deductions

- Forms 1098 or other mortgage statements
- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Real estate and personal property tax records
- Foreign taxes paid
- HUD statement showing closing date of home purchase
- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- Amounts of miles driven for charitable or medical purposes
- Amount paid for preparation of your 2020 tax return
- Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
- Job-hunting expenses
- Amount contributed for 2021 (and 2022 if applicable)

NOTE: For Direct Deposit/Debit, please verify your bank account & routing information.

Please Call to Schedule an Appointment: NJ Area: (732) 698-2990 NY Area: (888) 673-1TAX(1829) x101