City Center Tax Group

Tax Appointment Checklist

	Description	✓
1.	Last year's tax returns (if not prepared by this office)	
2.	W-2 Forms	
3.	1099 Forms for interest and dividends, sale of stock/mutual funds	
4.	1099-R Forms for pension and IRA distributions	
5.	Small business income and expenses including 1099-MISC forms received	
6.	Rental property income and expenses	
7.	Statement of IRA contributions made	
8.	Other Income: Alimony, gambling, hobby, cancellation of debt, unemployment	
9.	Foreign account statements (not reported on mutual fund or brokerage account)	
10.	Cryptocurrency account statements	
11.	Childcare expenses	
12.	Real estate settlement statements from refinancing, purchase and/or sale	
13.	Itemized Deductions:	
	- Medical expenses	
	- Real estate taxes	
	- Personal property taxes	
	- Mortgage interest statements	
	- Charitable contributions – even if you are not itemizing your deductions	
14.	Tuition Savings Plan (529 Plan) contributions and/or Form 1099-Q	
15.	Student loan interest statement – Form 1098-E	
16.	College tuition and fees (Form 1098-T and tuition account printout), receipts for books and supplies	
17.	Record (cancelled checks or bank records) of federal and state estimated tax payments	
18.	Health Insurance forms 1095-A, 1095-B, 1095-C	
19.	Driver's licenses or other state ID for taxpayer and spouse	
20.	IRS and/or state correspondence received, **including documentation for 3rd stimulus and/or advance child credit payments**	

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