



S.P.I.T.S.



SKINNER'S PROFESSIONAL INCOME TAX SERVICES

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Brooklyn, NY 11210

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Tax Appointment Checklist



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Please Note: For virtual tax clients, we can accept a scan or image of these items

Personal Information

- ☐ Your driver's license or other federal ID with picture
- ☐ Your social security card with your number or tax ID number
- ☐ Your spouse's full name and social security number or tax ID number
- ☐ Your spouse's driver's license or other federal ID with picture
- ☐ Notice 1444 for Stimulus check

Dependent(s) Information

- ☐ Dates of birth
- ☐ Social security numbers or tax ID numbers (cards must be provided if this is your first year with us or if this is a new child)
- ☐ Childcare records (including the provider's tax ID number) if applicable
- ☐ Income of other adults in your home
- ☐ Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

Income Sources

• Employed

- ☐ Forms W-2 or paystub for W-2 download
- ☐ Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)
- ☐ Health Savings Account (HSA) and long-term care reimbursements (1099-SA or 1099-LTC)
- ☐ Health Savings Account (HSA) or Medical Savings Account (MSA) distributions – 1099-SA



- **Employed** (continued)

- ☐ Expenses related to your investments
- ☐ Record of estimated tax payments made (Form 1040ES)

- **Other Income & Losses**

- ☐ Lottery or Gambling income/losses (W-2G or records showing income, as well as expense records)
- ☐ Jury duty records
- ☐ Hobby income and expenses
- ☐ Prizes and awards
- ☐ Trusts
- ☐ Royalty Income 1099 Misc.
- ☐ Any other 1099s received
- ☐ Record of alimony paid/received with Ex-spouse's name and SSN and Date of Divorce.
- ☐ Cancellation of Debt 1099-C

Deductions

- **Real Estate/Home Ownership**

- ☐ Forms 1098 or other mortgage interest statements
- ☐ Real estate and personal property tax records
- ☐ Receipts for energy-saving home improvements
- ☐ Repayment of the First-Time Homebuyer Credit – Form 5405
- ☐ All other 1098 series forms

- **Charitable Donations**

- ☐ Cash amounts donated to houses of worship, schools, other charitable organizations
- ☐ Records of non-cash charitable donations
- ☐ Amounts of miles driven for charitable or medical purposes

- **Medical Expenses**

- ☐ Amounts paid for healthcare insurance and to doctors, dentists, hospitals

- **Health Insurance**

- ☐ Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)
- ☐ Form 1095-B and/or 1095-C if you had insurance coverage through any other source (i.e. an employer, insurance company, government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc.)



- **Health Insurance** (continued)

- ☐ Marketplace exemption certificate (ECN) if you applied for and received an exemption from the Marketplace (Exchange)

- **Childcare Expenses**

- ☐ Fees paid to licensed day care center or family day care for care of infant or preschooler
- ☐ Wages paid to a baby-sitter

Do not include expenses paid through a flexible spending account at work

- **Educational Expenses**

- ☐ Forms 1098-T from educational institutions
- ☐ Receipts that itemize qualified educational expenses
- ☐ Records of any scholarships or fellowships you received
- ☐ Form 1098-E if you paid student loan interest

- **Job Expenses & Tax Prep Fees [limited deduction 2018 thru 2025]**

- ☐ Employment related vehicle expenses (tolls, mileage, gas, maintenance, license, property tax, interest expense, parking)
- ☐ Receipts for classroom expenses (for educators in grades K-12)
- ☐ Employment-related expenses (dues, education, publications, tools, uniform cost and cleaning, travel)
- ☐ Job-hunting expenses
- ☐ Record of moving expenses not reimbursed by employer
- ☐ Amount paid for preparation of last year's tax return

- **State & Local Taxes or Sales Tax**

- ☐ Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- ☐ State refund amount – 1099-G
- ☐ Invoice showing amount of vehicle sales tax paid

- **Retirement & Other Savings**

- ☐ Form 5498-SA showing HSA contributions
- ☐ Form 5498 showing IRA contributions
- ☐ All other 5498 series forms (5498-QA, 5498-ESA)



- **Federally Declared Disaster**

- ☐ City/county you lived/worked/had property in
- ☐ Records to support property losses (appraisal, clean-up costs, etc.)
- ☐ Records of rebuilding/repair costs
- ☐ Insurance reimbursements/claims to be paid
- ☐ FEMA assistance information
- ☐ Check FEMA site to see if my county has been declared a federal disaster area

- **Prior Year Tax Returns**

- ☐ Last Year's Federal and State Tax Returns [If prepared elsewhere]