



Smith & Harding  
Associates, LLC  
YOUR ACCOUNTING AND TAX PROFESSIONALS

## Tax Filing Requirements Checklist

Name(s): \_\_\_\_\_ Phone: \_\_\_\_\_

Home Address: \_\_\_\_\_

Email Address: \_\_\_\_\_

The following are specific questions relating to our tax returns and beneath the questions are information and/or forms that we will need to complete your return. Please answer or fill in necessary information and place a check in the box once you verify you have the document(s) to provide to us. If a certain question does not apply to you or your family, please just skip it or cross it out.

Did you get married and/or divorced or separated (circle one) during 2020? Yes or No

- date this legally took place: \_\_\_\_\_
- court paperwork

Did you have a child born or adopted in 2020? Yes or No

- date of birth or adoption: \_\_\_\_\_
- birth certificate
- adoption certificate
- social security card

Did you receive the Economic Impact Payment (stimulus) in 2020? Yes or No

- amount of payment: \_\_\_\_\_
- IRS notice 1444

Did you have earned income (from employment) in 2020? Yes or No

- W-2(s)

Did you receive unemployment in 2020? Yes or No

- 1099-G

Did you have self-employment and/or rental income in 2020? Yes or No

- 1099(s)
- Income log
- Expenses log
- Vehicle log

If you are self-employed did you contribute to a retirement plan? Yes or No

- type of plan: \_\_\_\_\_
- amount of contribution: \_\_\_\_\_

If you are self-employed did you pay for self-employed health insurance? Yes or No

- amount paid in 2020: \_\_\_\_\_

**Did you have any partnership interest in 2020?** **Yes or No**

- **K-1(s)**

**Did you have any interest income in 2020?** **Yes or No**

- **1099-INT(s)**

**Did you have any dividend income in 2020?** **Yes or No**

- **1099-DIV(s)**

**Did you have Market Place Health insurance in 2020?** **Yes or No**

- **1095-A**

**Did you sell any stock or other property in 2020?** **Yes or No**

- **1099-B(s)**

**Did you have any debt discharged in 2020?** **Yes or No**

- **1099-A or 1099-C**

**Did you have any retirement plan distributions in 2020?** **Yes or No**

- **1099-R(s)**

- **If yes and you are under age 59 1/2 were these distributions due to a financial hardship because of COVID-19?** **Yes or No**

- **If yes, please explain:** \_\_\_\_\_

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**Did you have any child-care expenses in 2020?** **Yes or No**

- **Year-end statement**

- **child's name:** \_\_\_\_\_

- **provider's name:** \_\_\_\_\_

- **provider's address:** \_\_\_\_\_

- **provider's EIN or social:** \_\_\_\_\_

**Did you or a dependent child attend College in 2020?** **Yes or No**

- **1098-T**

- **student's name:** \_\_\_\_\_

- **dates of attendance:** \_\_\_\_\_

- **full or part time:** \_\_\_\_\_

**Is there any additional information that you feel is relevant to the completion of your tax return for 2020? If so, please use the following space to give us those details.**

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**Please include this form with your documents you submit to us either by dropping off or uploading to the secure portal once you have everything together. Thank you!**