



Smith & Harding
Associates, LLC
YOUR ACCOUNTING AND TAX PROFESSIONALS

Tax Filing Requirements Checklist for 2021

Name(s): _____
Cell 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 2021? Yes or No

- date this legally took place: _____
- court paperwork

Did you have a child born or adopted in 2021? Yes or No

- date of birth or adoption: _____
- birth certificate
- adoption certificate
- social security card

Did you receive the third Economic Impact Payment (stimulus) in 2021? Yes or No

- amount of payment: _____
- IRS notice 6475

Did you receive the Advance Child Tax Credit payments in 2021? Yes or No

- total amount received: _____
- IRS notice 6419

Did you have earned income (from employment) in 2021? Yes or No

- W-2(s)

Did you receive unemployment in 2021? Yes or No

- 1099-G

Did you have self-employment and/or rental income in 2021? 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 2021: _____

Did you have any partnership interest in 2021? Yes or No

- K-1(s)

Did you have any interest income in 2021? Yes or No

- 1099-INT(s)

Did you have any dividend income in 2021? Yes or No

- 1099-DIV(s)

Did you have Market Place Health insurance in 2021? Yes or No

- 1095-A

Did you sell any stock or other property in 2021? Yes or No

- 1099-B(s)

Did you have any debt discharged in 2021? Yes or No

- 1099-A or 1099-C

Did you have any retirement plan distributions in 2021? Yes or No

- 1099-R(s)

Did you have any child-care expenses in 2021? 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 2021? 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.

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!