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**TAX FILING CHECK-LIST**

***Changes in your tax status and other information I need to know.***

Did your marital status change during the year?

Did your address change during the year?

Did you get a new Driver License or State ID this year?

Were there changes to your dependents?

Did you incur Childcare expenses? (The provider's Name & EIN will be required.)

Did your Bank Account change this year?

Did you receive or sell or exchange or otherwise dispose of a digital asset? (i.e. crypto currency)

Did you make any residential energy-improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?

New Electric or Hybrid Automobile?

Did you incur a loss because of damaged or stolen property?

Did you receive a distribution from or contribute to a retirement plan (401K, IRA, etc…)

Did you transfer or rollover any amount from one retirement plan to another?

Did you convert part or all of your traditional SEP/SIMPLE IRA to a Roth IRA?

Did you receive or pay Alimony? (The other party's Name and SSN will be needed)

Did you have Educator expense?

Did you have Self-Employed Health Insurance Premiums.

**COMMON TAX FORMS YOU MAY RECEIVE:**

W-2: Wages, Salaries & Tips

W-2G: Gambling winnings

1099-G: Unemployment & State Tax Refunds

1099-NEC: Non-Employee Compensation

1099-INT: Interest Income

1099-S: Sale of your home or other Real Estate

1099-Q: Distributions from a 529 College Savings Plan

1095-A: Affordable Care Act Health Insurance Stmt.

1098-T: Tuition and related expenses

W-4P: Pension or Annuity Payments

SSA-1099: Social Security Benefits

1099-R: Retirement Account Distributions

1099-MISC: Rents, Royalties & Other Income

1099-DIV: Dividends & Distributions

1099-B: Sale of Stocks

1099-K: Payment Card & 3rd Party Network Transactions

1098: Mortgage Interest Statement

1098-E Student loan interest paid