

What I Need to File



Reminder: 2020 taxes are due April 15, 2021 for calendar year filers

You Spouse Dependents

Basic Info

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Name, SSN or ITIN, and date of birth

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Last Year's Return - hard copy or PDF file (We can import basic info from PDF's of returns prepared by select software solutions)

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Estimated Taxes Paid

You Spouse Dependents

Documents Received

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Form W-2s - wage and tax statements

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Form 1095s - includes health insurance marketplace statement (1095-A), health coverage (1095-B) and employer-provided health insurance offer and coverage (1095-C)

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Form 1098s - includes mortgage interest (1098) and student loan interest (1098-E)

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Form 1099s - includes dividend income (1099-DIV), interest income (1099-INT & 1099-OID), merchant card and third party network payments (1099-K), miscellaneous income (1099-MISC), retirement plan distribution (1099-R), sale of home or real estate (1099-S), capital gain transactions (1099-B), distributions from an HSA, Archer MSA, or Medicare Advantage MSA (1099-SA) and unemployment compensation (1099-G)

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Form 2439s - notice to shareholder of undistributed long-term capital gains

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Schedule K-1s - partnership, S Corporation and estate or trust income

You Spouse Dependents

Personal Records

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Child and Dependent Care Expenses

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Education Expenses


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Medical Expenses

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Vehicle (Personal Property) Taxes Paid

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You	Spouse	Dependents	 E-file/Print
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bank Information (Account and Routing Number for Direct Deposit/Withdrawal)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Prior year's Self-Select PIN or Prior year's AGI (Adjusted Gross Income)