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Tax Return Checklist 2021

Please return this checklist along with any accompanying documents/financial information.

| Personal Information | Spouse Information (If Applicable) |
|---|--|
| Name: _____ | Name of Spouse: _____ |
| SSN: _____ DOB: ___/___/___ | SSN: _____ DOB: ___/___/___ |
| Home #: _____ Cell #: _____ | Home #: _____ Cell #: _____ |
| E-mail: _____ | E-mail: _____ |
| Address: _____ | Address: _____ |
| City: _____ State: _____ Zip: _____ | City: _____ State: _____ Zip: _____ |
| Country: _____ | Country: _____ |
| *Please send a copy of your most recent state ID* -- NY residents (front and back) -- | *Please send a copy of your most recent state ID* -- NY residents (front and back) -- |
| Marital Status: Single Married Common-Law Separated Divorced Widowed | Direct Deposit Info Checking Savings |
| Did your marital status change from last year's tax return? Yes <i>Date status changed:</i> No MM / DD / YY | Bank Name: _____ Routing #: _____ Account #: _____ |

Children and Other Dependents (FULL NAME AS IT APPEARS ON SOCIAL SECURITY CARD)

| Name | Relationship | Birthday (MM/DD/YY) | SIN # |
|-------|--------------|---------------------|-------|
| _____ | _____ | ___/___/___ | _____ |
| _____ | _____ | ___/___/___ | _____ |
| _____ | _____ | ___/___/___ | _____ |
| _____ | _____ | ___/___/___ | _____ |
| _____ | _____ | ___/___/___ | _____ |

Notes and additional informations:



TAX PREP CHECKLIST FOR CLIENTS

General Information

- Name, Date of Birth & SS Numbers for You & Your Spouse
- Bank Name, Routing #, and Account # (For direct deposit/debit purposes)
- Educational Expenses for You and Your Spouse
- Copy of Last Year's Tax Return
- Prior Year Adjusted Gross Income (AGI) & Personal Identification
- Dependents' Names, Dates of Birth, & Social Security Numbers
- Dependents' Post High School Educational Expenses
- Child Care Expenses for Each Dependent (Including Tax ID of Institution or Person paid)

General Taxable Income

- W-2 Form(s) for Wages, Salaries, and Tips
- Alimony Received or Paid
- Dividend Income Statements: Form 1099-DIV
- Interest Income Statements: Form 1099-INT & 1099-OID
- Miscellaneous Income: Form 1099-MISC
- Sales of Real Estate: Form 1099-S
- Sales of Stock, Land, etc.: Form 1099-B
- State Tax Refunds: Form 1099-G
- Unemployment Compensation Received

Retirement Income

- Railroad Retirement & Social Security Income: Form SSA-1099
- Retirement Income: Form 1099-R

Business Income

- Business Income and Expenses
- Farm Income and Expenses
- Form K-1 Income from Partnerships, Trusts, and S-Corporations
- Rental Income and Expenses
- Tax Deductible Miles Traveled for Business Purposes

Tax Credits Checklist

- Adoption Expense Information
- Child Care Provider Address, I.D. Number and Amounts Paid
- First Time Home Buyer Tax Credit
- Foreign Taxes paid

Expense and Tax Deduction Checklist

- Casualty and Theft Losses
- Charitable Cash Contributions
- Doctor and Dentist Payments
- Fair Market Value of Non-cash Contributions to Charities
- Home Mortgage Interest from Form 1098
- Home Second Mortgage Interest Paid
- Hospital and Nurse Payments
- Investment Expenses
- IRA Contributions
- Job-hunting Expenses
- Last Year's Tax Preparation Fee
- Medical Expenses for the Family
- Medical Insurance Paid
- Miles Traveled for Volunteer Purposes
- Miles Traveled for Medical Purposes
- Miles Traveled Related to Your Job
- Moving Expenses
- Personal Property Taxes Paid
- Prescription Medicines and Drugs
- Real Estate Taxes Paid
- State Taxes Paid with Last Year's Return (if itemized)
- Student Loan Interest Paid
- Tax Deductible Unreimbursed Expenses Related to Your Job
- Union and Professional Dues
- Unreimbursed Expenses Related to Volunteer Work

Tax Estimate Payments Checklist

- Estimated Tax Payments Made with ES Vouchers
- Last Year's Tax Return Overpayment Applied to This Year