



**SONG
TAX & ACCOUNTING
SOLUTIONS LLC**



Office: (856) 663-1944
Cell: (646) 619-7525
Fax: (856) 997-2322

mona@songtaxaccounting.com

Client Checklist Year 202_

Taxpayer(s) Information

Name:		DOB:	SS#
Spouse Name:		DOB:	SS#
Marital Status	<input type="checkbox"/> Single	<input type="checkbox"/> Married	<input type="checkbox"/> Head of Household
Address:			
Phone #	Email:		Occupation: _____
Checking <input type="checkbox"/>	Saving <input type="checkbox"/>	Bank Account #	Routing #

Dependent (s) Information

<u>Name</u>	<u>DOB</u>	<u>SS#</u>	<u>Relationship</u>

INCOME ITEM(S)- Applies to Most Taxpayers (Mark How Many of Each Item You Have) For instance, 3 W2 Forms

- ___ **W2** forms
- ___ **1099-NEC** forms – Independent Contract Work Income
- ___ **1099-G** forms – Unemployment Compensation, or State or Local Tax Refunds
- ___ **1099-R** forms – IRA/Pension Distribution
- ___ **1099-INT/1099-DIV/1099-B/Schedule K-1** – Interest or Investment income
- ___ **SSA-1099** – Social Security Benefit
- ___ 1099-K forms – Third-party Income such as PayPal
- ___ 1099-C forms – Cancellation of Debt
- ___ 1099-S forms – Property Sales Income
- ___ Business or Farming Income – Profit/Loss Statement, Capital Equipment Information
- ___ Rental Property Income and Expenses – Profit/Loss Statement, Suspended Loss Information
- ___ Prior Year Installment Sale Information – Form 6252, Principal and Interest Collected during the year, SSN and Address for payer
- ___ Alimony Received prior to 2019
- ___ Royalties, Partnerships, S Corporation, Trust, etc.
- ___ Taxable Health Saving Account Distribution



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- W2-G forms - Gambling Winnings
- Stock Options
- Payment for Jury Duty
- Scholarships
- Prizes and Awards
- Foreign Income

OTHER INFORMATION

- 1) Estimated Tax Payments Made during the year (Self-Employed)
- 2) Prior-Year Refund applied to Current Year and/or Any Amount Paid with an Extension to File
- 3) Foreign Bank Account Information – Location, Name of Bank, Account Number, Peak Value of Account during the year

ADJUSTMENT ITEMS – Applies to Most People (Mark How Many of Each Item You Have)

- 1098-T form – Tuition paid or Receipt/Canceled Checks for Tuition paid for Post-High School
- 1098-E form – Student Loan Interest Paid (or Loan Statements for Student Loans)
- Records of IRA Contribution made during the year
- Records of Medical Savings Account (MSA) Contribution
- Records of Moving Expenses
- Alimony paid for Divorces Executed prior to 2019
- Self-Employed Health Insurance Payment Records
- Keogh, SEP, SIMPLE, and other Self-Employed Plans
- Receipts for Qualifying Energy-Efficient Home Improvement (Solar, Windows, etc.)
- For Teachers – Canceled Check or Receipts for Expenses paid for Classroom Supplies, etc.

ADJUSTMENT (DEDUCTION) ITMES – if Itemized (Mark How Many of Each Item You Have)

- 1098 form – Mortgage Interest, PMI and Points paid
- Charitable donations – Cash Amounts, Official Charity Receipts, Canceled Checks, Value of Donated Property, Miles Driven and Out-Of-Pocket Expenses
- Medical and Dental Expense Records
- Child Care Costs: Provider’s Name, Address, Tax ID and Amount Paid
- Investment Interest Expenses
- Casualty and Theft Losses – Amount of Damage, Insurance Reimbursements
- Records/Amounts of Miscellaneous Tax Deductions: Union Dues, Unreimbursed Employee Expenses (Uniforms, Supplies, Seminars, Continuing Education, Publications, Travel, etc.)
- Rental Property Income/Expenses: Profit/Loss Statement, Rental Property Suspended Loss Information
- Records Business Use of Home Expenses for Self-Employed, Home Size/Office Size, Home Expenses
- Taxes Paid
 - State/Local Income Taxes Paid
 - Real Estate Taxes Paid
 - Personal Property Taxes
 - Vehicle License Fees based on Value of Vehicle

Signature (1): _____

Signature (2): _____

Date: _____

Date: _____