

## What do I need to bring to my tax appointment?

### My Check List:

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#### Personal Information:

- Your social security number
- Your spouse's full name & social security number
- Your Drivers License
- Amount of any alimony paid and ex-spouse's social security number
- Your 2018 and 2019 tax return(s). Your tax professional can check them for accuracy.
- Client Agreement signed by you and spouse.
- Completed Tax organizer (short form)

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#### Employee Information:

- W-2 Forms

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#### Healthcare information:

- HSA for 5498 -SA
- 1095-A for marketplace

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#### Other People who may belong on your return:

- Dates of birth and social security numbers
- Childcare records (including the provider's ID number) if applicable
- Approximate income of other adults in your home (not spouse, if you're filing jointly)
- Form 8332, copies of your divorce decree, or other documents showing that your ex-spouse is releasing their right to claim a child to you.

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#### IRA Information:

- Amount contributed for 2020
- Traditional IRA basis
- Value of IRAs on Dec 31, 2020

#### Rental Income:

- Records of income and expenses
- Rental asset information (cost, date placed in service, etc.) for depreciation

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#### Other Income:

- Unemployment, state tax refund (1099-G)
- Gambling income (W-2G or records showing income, as well as expense records)
- Amount of any alimony received and ex-spouse's name
- Health care reimbursements (1099-SA or 1099-LTC)
- Jury duty records
- Hobby income
- Prizes and awards
- Other 1099

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#### Education Payments:

- Bills from the educational institution or anything else that itemizes what you paid or received loans for versus what was covered by scholarship or other financial aid
- Forms 1098-T and 1098-E, if you received them
- Scholarships and fellowships

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#### Savings and Investments:

- Interest dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-S)
- Dates of acquisition and records of your cost or other basis in property you sold

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## *Itemizing Deductions:*

- Form 1098 or other mortgage statements
- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Real estate and personal property tax records
- Invoice showing amount of vehicle sales tax paid
- HUD statement showing closing date of home purchase
- Cash receipts donated to houses of worship, schools, and other charitable organizations
- Records of non-cash charitable donations – must be itemized with amounts
- Amounts paid for healthcare insurance to doctors, dentists, hospitals
- Amounts of miles driven for charitable or medical purposes

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## *Vehicle Information:*

- Total miles driven for the year (or beginning/ending odometer readings)
- Total business miles driven for the year (other than commuting)
- Amount of parking and tolls paid
- If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

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## *Self-Employment Information:*

- Form 1099-Misc, Form 1099-NEC, Schedules K-1, income records to verify amounts not reported on 1099's
- Records of all expenses – check registers or credit card statements, and receipts
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Balance sheet and profit & loss statements for the year

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## *Retirement Income*

- Pension/IRA/annuity income (1099-R)
- Social security/RRB income (1099-SSA, RRB-1099)