

TAX APPOINTMENT CHECKLIST

- **Personal information –**
 - Birth or Adoption of a child- copy of social security card & birth certificate
 - Banking information for Direct Deposit or if changed bank during the year
 - Stimulus payment – Amount received and date for both third and any additional (after 2020 tax return was processed) stimulus payments during 2021 (copy of bank statement showing direct deposit of funds or check deposited into account or IRS letter)
- **Income Documents (If applicable)**
 - W-2 for any jobs
 - Lottery or gambling winnings (Form W-2G, also bring win/loss statements to show any losses)
 - Interest and Dividend statements
 - Form 1099-B for Broker transactions-don't forget any App based ones such as Robinhood,Acorn,Weeble and Coinbase.
 - If you only have a crypto wallet that will not issue a 1099B, please be aware you are able to export crypto transactions to form 8949 which will be needed at your appointment
 - Retirement plan distribution (1099-R)
 - Social Security benefits (Form 1099-SSA)
 - Alimony Income (divorce decree signed after 1/1/19)
 - Rental Income (Must complete and sign our worksheet)
 - Self-Employment income (**Must complete and sign Sched C worksheet**)
 - Cancellation of Debt (bring 1099-C issued)
 - State/Local income tax refund
- **Dependents-if applicable**
 - Copy of IRS Letter 6419 (for both taxpayers) if you received advance payments – **return cannot be completed without this letter**
 - Dependent care costs – name, address, tax ID or social security number- this credit has changed for 2021 and **credit cannot be taken on return** without supporting documentation listing providers identification
- **Deduction information required**
 - Mortgage interest form (1098)
 - Home equity interest form (if used for home improvement/home purchase only)
 - Real Estate taxes paid
 - Medical/Dental
 - Education/Tuition (Form 1098-T)
 - Charitable Contributions (client needs to keep receipts)
 - Student loan interest (Form 1098-E)
- **Miscellaneous**
 - IRA contributions
 - Health Insurance Coverage (Form 1095-A if purchased through the marketplace)
 - **Unemployment form 1099-G MUST BE DOWNLOADED FROM NYS WEBSITE**
 - If you repaid any COVID19 distributions taken from a retirement account, bring 1099 showing repayment