Information Reminder List

The most commonly needed items to finish your tax returns.

Items Required for our Services

Please be sure to complete the Questionnaire and sign the Engagement Letter, both of these are required before we will engage in preparing your taxes.

If you are a new client, please also provide copies of the last three years of federal, state and local income tax returns and related depreciation schedules if applicable.

Covid -19 Information

- Amount received for the 3rd Covid stimulus payment.
  The third round of payments were sent in March of 2021. The IRS sent Letter 1444-C to those who received payments, please submit this letter with your documents. You may also provide us with a printout of the payment amount shown in your IRS.gov account.
- Any amounts received as Advance Child Tax Credit payments.
  The IRS sent notice 6419 to those who received these payments. Please submit this notice with the rest of your documents. Alternatively, you may provide us with a printout from your IRS.gov Child Tax Credit Update Portal. For married taxpayers, we will need a printout from each of your accounts.

ACA Forms

- All Forms 1095-A, 1095-B and/or 1095-C you received.
- All Forms 1099-H received for Health Coverage Tax Credit advance payments.

Income Related Forms

- All W-2s, W-2 Gs & final paycheck stub.
- All form 1099s received confirming income from interest, dividends, retirement, social security, disability, unemployment, non-employee compensation, etc.
- 1099s for brokerage accounts showing sales for stocks, bonds, etc.
- If you sold any shares of stocks or mutual funds and basis information is not provided by the broker, detail all activity in the stocks or funds sold from the original purchase date through the date of the sale (year-end summary statements are ideal).
- Copies of all LLC, Partnership or S Corporation K-1s.
- All income information for children for kiddie tax and to prepare their tax returns.

Deduction & Credit Information

- Please provide us with the totals of all your cash charitable donations. **You need to have appropriate documentation for all charitable donations in order for them to be deductible.** Please provide details even if not itemizing.
- Totals for miscellaneous non-cash contributions totaling less than $500 or details for non-cash contributions if your yearly total exceeds $500. All deductions need documentation, and any list of items donated needs to have your valuation for the items, we cannot value items for you.
- If you donated a car this year, you will need to have a form 1098-C from the charity or other written acknowledgment in order to substantiate the donation.

Deduction & Credit Information Cont.

- If you paid for childcare while you worked, please provide the amounts paid per child, and the name, address and SSN or EIN of the provider.
- Form 1098-T for college tuition paid, along with an itemized statement from the institution showing amounts paid in 2021 for you or your dependents.
- Year-end statement of mortgage interest (form 1098), escrow activity and balance on mortgage or home equity loans and real estate taxes paid.
- Auto tabs- we need to see the actual tab, not just the total you paid. If you don't have the tab available, please provide the license plate number of the vehicle.
- If you are claiming auto mileage as a deduction for business, rental properties or unreimbursed employee expenses, please provide both the total miles and the business miles driven in 2021. You are required to have an auto mileage log to claim a deduction.
- If you lease your car or are deducting actual automobile expenses, please also provide: original value of the car (what you could have bought it for) and date of lease, and all expenses for lease payments, gas, car washes, licenses, insurance etc.

Legal Forms

- All legal documents for formation, sale or purchase of a business during the year.
- All legal documents related to divorce decrees, including form 8332 for claiming dependents.
- If you bought, sold or refinanced real estate, provide a closing statement for each transaction.

Tax Information

- Copies of any federal, state or local tax correspondence received during the year, including all payments made or refunds received.
- Federal and state quarterly estimated tax payment amounts and dates paid.
- Please provide a voided check if you would like to set up direct deposit for any refunds.