



Tax Appointment Checklist

All NEW clients, please bring or upload a copy of last year's tax return!

Income:

W-2's

Pension statements (1099R)

Unemployment statement (1099G)

Social Security

All other sources of income

****If you received a 3rd Stimulus Check in 2021 (Form 1444-C), please advise us of the amount of that direct deposit or check amount. You may be entitled to a larger credit on your 2021 return, and in no case will it have to be paid back**.**

Banking/Investments:

1099-INT - Interest income

1099-DIV - Dividend income

1099-B - Stock trades (purchase dates & prices)

(For more than 20 trades, please provide an excel file)

Home:

Mortgage interest statement (1098)

Property tax bill

Closing Disclosure Statement for refinance

Closing Disclosure Statement for purchase or sale

New solar panel purchase/lease documents

Purchases/Sales Tax:

Receipts for large purchases (car, furniture, etc.)

Purchase of Qualified Electric Plug-In Vehicle – please bring Vehicle Identification Number (VIN) with you

Health Insurance:

Marketplace statement (1095A)

HSA form (1099SA)

Childcare:

Provider EIN or SS # and total amount paid

Advanced Child Tax Payments Received during 2021:

Advanced Child Tax payments will be reported on IRS Letter 6419. We will need to know the amounts you received from July through December of 2021. They will be reconciled on your 2021 tax return.

College:

College tuition (1098T)

Student loan interest (1098E)

529 contributions

*** Include Social Security number for any new dependents*.**