

## NEW CLIENT TAX RETURN CHECKLIST

Name: \_\_\_\_\_ Contact #: \_\_\_\_\_

**Information** Email: \_\_\_\_\_

- Copy of last year's return**
- Names, social security numbers, and **DOB's for all family members**
- Address and phone number

**Income & Expenses (please bring in all that apply)**

- W-2                       Unemployment                       1099G
- 1099INT                       1099DIV                       1099MISC                       K-1
- 1099A    1099C    1099S    1099K                       Any other income\* \_\_\_\_\_
- 1099B- (must include cost basis info)

**Schedule E (RENTAL PROPERTY):**

- 1099 Rent (if multiple properties then match 1099 to property)
- Additional rental income not listed on 1099
- 1098 (if multiple properties then match 1098 to property)
- Taxes, insurance, repairs, fees, utilities, etc
- Depreciation report from last year's tax return or HUD1 if 1<sup>st</sup> year

**Miscellaneous**

- Rent paid (out of pocket) amount?**
- Estimated tax payments made for 2020 (federal and state)?
- Letter from doctor or school verifying children live at your address (If claiming EIC)
- Dependent Care Expenses (Provider name, social, address, amount paid)
- \_\_\_\_\_
- Letter 6475 with amount of IRS EIP 3 (a.k.a. stimulus payment round 3)  
\$ \_\_\_\_\_
- \*Note, the payment was most likely issued in March 2021
- IRS Notice with 2021 advance child tax credit payments
- Did you and your family have health insurance in 2021?  Yes  No
- Bank acct # \_\_\_\_\_ Routing # \_\_\_\_\_
- Copy of driver's license(s)

**Deductions**

- Medical
- Real Estate Tax
- Mortgage Interest
- Charity
- \* If you are married and filing jointly, did you make at least \$600 of tax-deductible contributions in 2021?  Yes  No
- \*If you are single, did you make at least \$300 of tax-deductible contributions in 2021?  Yes  No

**Notes:** \_\_\_\_\_