

Client Tax Checklist

Please provide us with details on any of the following items that pertain to you for tax year 2021:

NOTES

- Amount received for 3rd Stimulus (March 2021)
(please provide IRS Letter 6475)**
- Amounts received for Advance Child Tax Credit
(please provide IRS Letter 6419)**
- If you have an HSA plan please provide forms
1099-SA and 5498-SA**
- Change of name w/ SSA (e.g. if recently married)
- Change of marital status
- Change of contact phone number(s)
- Change of mailing address
- Change in e-mail address
- Change of occupation
- Change of dependents
- Change of bank account for direct deposit of refund
- Cost of health insurance
- If you use your vehicle for business, please provide
 - Please provide mileage
 - Business
 - Personal
 - Commuting
 - Total
- If you sold stocks, bonds or mutual funds please provide year-end 1099s
- If you bought or sold real estate please provide a HUD-1 settlement sheet for each property
- If you paid or received alimony
- If you incurred qualified educator expenses (for teachers/administrators K-12 only)
- If you contributed to a traditional or Roth IRA please provide form 5498, if available
- If you contributed to a SEP or profit sharing plan
- If you paid student loan interest please provide form 1098-E
- If you contributed to a 529 education savings plan
- If you paid college tuition please provide form 1098-T or 1099-Q if 529 plan distribution
- Provide computation of the following deductions:
 - Medical exps (if greater than 7.5% of AGI)
 - Real estate taxes (if not on mtg. stmt.)
 - Mortgage interest (if not on mtg. stmt)
 - Charitable contributions (cash & non-cash)
 - Unreimbursed job related costs
- If you incurred costs for camp/childcare (we need the care-provider names, addresses and TINs as well as the cost breakdown by provider and by child)
- If you made energy saving improvements to your home or business (solar only for 2021)
- If you paid federal and/or state estimated taxes, please provide breakdown of all payments made
 - 1st quarter (due by 4/15)
 - 2nd quarter (due by 6/15)
 - 3rd Quarter (due by 9/15)
 - 4th Quarter (due by 1/15)