

2021 TAX PREPARATION CHECKLIST

DATE: _____

ARE YOU A NEW CLIENT? YES NO
REFERRED BY: _____

PRIMARY TAXPAYER:

SPOUSE OR PARTNER:

Name: _____

Name: _____

SSN: _____

SSN: _____

DOB: _____

DOB: _____

Address: _____

Address: _____

City, State, Zip: _____

City, State, Zip: _____

Occupation: _____

Occupation: _____

Cell/Primary#: _____

Cell/Primary #: _____

Email: _____

Email: _____

➤ **STATUS:**

MARRIED SINGLE DIVORCED/SEPARATED WIDOWED HEAD OF HOUSEHOLD

➤ **DEPENDENTS: PROVIDE US WITH A COPY OF EACH DEPENDENT'S BIRTH CERT. AND SS CARD IF NOT ALREADY ON FILE**

NAME	DATE OF BIRTH	SS NUMBER	RELATIONSHIP
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

➤ ***A DRIVER'S LICENSE OR STATE ISSUED ID MAY BE REQUIRED TO FILE CERTAIN RETURNS***

Taxpayer Information:

Spouse or Partner Information:

Issuing State of License: _____

Issuing State of License: _____

ID Number: _____

ID Number: _____

Expiration Date: _____

Expiration Date: _____

Issue Date: _____

Issue Date: _____

Doc # (Found on Back): _____

Doc # (Found on Back): _____

➤ ***IN ORDER TO HAVE YOUR REFUND DIRECT DEPOSITED PLEASE GIVE YOUR TAX PREPARER THE FOLLOWING INFO:*** CHECKING SAVINGS

BANK'S NAME: _____

RTE# _____

ACCT# _____

DOCUMENT CHECKLIST

INCOME:

- | | |
|---|--|
| <input type="checkbox"/> Employer (W-2) | <input type="checkbox"/> Foreign Income |
| <input type="checkbox"/> Self-Employed (1099-Misc) | Please provide bank & account info |
| <input type="checkbox"/> Interest Income (1099-Int) | <input type="checkbox"/> Crypto Currency |
| <input type="checkbox"/> Dividend Income (1099-Div) | Please provide account transactions |
| <input type="checkbox"/> Stock or Mutual Funds (1099-B) | |
| <input type="checkbox"/> Social Security (SSA-1099) | |
| <input type="checkbox"/> Unemployment (1099-G) | |
- OBTAIN FROM STATE WEBSITE

ADVANCED CHILD TAX CREDIT:

- The IRS mailed Letter 6419 to people who received the Advanced Child Tax Credit
- You can check the Advance Child Tax Credit Payments by using the following link:
<https://www.irs.gov/credits-deductions/advance-child-tax-credit-payments-in-2021>
- What was the Advance Child Tax Credit Received? _____

ECONOMIC IMPACT PAYMENT (CORONAVIRUS RELATED STIMULUS PAYMENT):

- The IRS mailed Notice 1444-C and/or Letter 6475 to people who received a third Economic Impact Payment in 2021
- You can check the stimulus amount received by using the following link:
<https://www.irs.gov/coronavirus/economic-impact-payments>
- What was your stimulus payment received? _____

NY 529 COLLEGE SAVINGS PROGRAM:

- NY 529 PLAN AMOUNT CONTRIBUTED in 2021: _____

HEALTH INSURANCE:

Where did you obtain your insurance from: _____ Employer _____ Marketplace
If through the Marketplace, please provide your Form 1095

COLLEGE TUITION:

Did you, your spouse, or dependent attend a College/University during 2021? _____ YES _____ NO
If YES, you must supply us with Form 1098-T, along with a Bursar Receipt indicating amounts paid during 2021

CHILD AND DEPENDENT CARE EXPENSES:

Please provide Preparer the Care Provider Name, Address, Employer ID/SS Number, and amounts paid during 2021