

TAX PREP CHECKLIST

ALL FILERS

- W-2
- SSN & DOB for anyone on the tax return
- Medical expenses if over 7.5% of your income
- 1099 forms for all income
- Charitable contributions
- New Clients- previous year tax return
- If claiming dependents, residential verification with their name and your home address
- Unemployment income (form 1099G)

-HOME OWNERS-

- If purchased in 2020, closing statement
- Mortgage interest statement (Form 1098)
- Property tax total
- PMI total if not on Form 1098
- Solar panel purchase agreement if applicable

NOTES

TAX PREP CHECKLIST

PERSONAL MISC

-EDUCATION-

- 1098T form from college/university
- Book expenses
- Electronics purchased
- School supply expenses

-CHILDCARE-

- Name of childcare provider
- Address
- Phone number
- SSN or Tax ID number
- Total paid

-RETIREMENT-

- IRA contributions
- HSA contributions
- 401k distribution (1099R form)

-REFUNDS-

- State refund form (1099G)

NOTES