

# TAX FORMS CHECKLIST

✓ *If the tax form applies*

## 1. Prior Year Tax Return

- Completed client info sheet
- Prior two years of tax returns (if applicable)

## 2. Income Reporting

- All W2 Wage forms
- Form 1099-A (Foreclosure of a home)
- Form 1099-B (Stocks Proceeds, sale of stocks | Realized gain or loss report from stocks, bonds, mutual funds, and other capital investments sold during the tax year.)
- Form 1099-C (canceled debts)
- Form 1099-DIV (Dividend Income)
- Form 1099-G (State tax refund or unemployment)
- Form 1099-INT (Interest Income)
- Form 1099-K (Business or rental income processed by third party network)
- Form 1099-LTC (Benefits received from a long-term care policy, (if applied))
- ALL** 1099-MISC (Self-employed, independent contractor, or other types of income)
- ALL** 1099-NEC (Non-employee compensation)
- Form 1099-OID (original issue discount in bonds)
- Form 1099-PATR (Patronage dividends)
- Form 1099-Q (Distribution from an education savings plan)
- Form 1099-QA (Distributions from an ABLE account)
- Form 1099-R (Distributions from individual retirement account, 401(K))
- Form 1099-SA (Social Security Benefits)
- Form RRB-1099 (Railroad retirement benefits)
- Schedule K-1 (Income from partnerships, S-Corporations, estates, or trusts)
- Rental Income (from property you or your spouse owned)

## 3. Deductions & Credits

- Form 1097-BTC (Bond tax credit)
- Form 1098 (Mortgage Interest Statement)
- Form 1098-C (Charitable contributions of vehicles)
- Form 1098-E (Tuition Loan Interest Statement)
- Form 1098-MA (Homeowner mortgage payments)
- Form 1098-T (Student tuition statement for higher education) (If apply, what year)

- Business Expense – If applicable, please inform us for further required detail
- Childcare expenses
- Gambling losses
- Medical Expenses
- Real Estate Tax Bill
- Receipt or acknowledgement letters for gifts to charity
- Rental expenses (summarized by property, type, and amount)

**4. Health Insurance Information**

- Form 1095-A
- Form 1095-B
- Form 1095-C
- HSA/MSA

**5. MISC Questions or items to consider**

- Did you sell, buy, or exchange virtual currency?
- Did you receive the advance child tax credit payment?
  - If yes, ensure to provide us with Notice 6419 or be able to log into your IRS account
- Did you receive the 3<sup>rd</sup> economic impact payment (EIP or stimulus)?
  - If yes, ensure to provide us with Notice 6475 or be able to log into your IRS account