AccountingPlus INC

# Tax Season Checklist

**Personal information** -

- ✓ Last 2 years' income tax if you are a new client
- ✓ Client Questionnaire (New or Returning)
    - Name, address, Social Security number and Date of Birth for yourself, spouse, and dependents
    - Dependent Provider, Name, Address, Tax ID and S.S.N.
    - Banking information if Direct Deposit Required

**Income Data Required** -

- ✓ Wages and/or Unemployment
- ✓ Interest and/or Dividend Income
- ✓ State/Local income tax refunded
- ✓ Social Security Income
- ✓ Pension/Annuity/Stock or Bond Sales
- ✓ Corporation/Partnership/Trust/Estate Income (K-1)
- ✓ Gambling/Lottery Winnings and Losses/Prizes/Bonus
- ✓ Alimony Income
- ✓ Rental Income
- ✓ Debt Cancellation Income (1099-C)
- ✓ Self Employment/Tips
- ✓ Foreign Income
- ✓ Real Property Sales (Sale of a home)

AccountingPlus INC

**Expense Data Required** -

- ✓ Dependent Care Costs
- ✓ Education/Tuition Costs/Materials Purchased
- ✓ Medical/Dental premiums & expenses
- ✓ Mortgage/Home Equity Loan Interest/Mortgage Insurance
- ✓ Employment Related Expenses
- ✓ Gambling/Lottery Expenses
- ✓ Real Estate Taxes
- ✓ Estimated Tax Payments to Federal and State Government and Dates Paid
- ✓ Charitable Contributions Cash/Non-Cash
- ✓ Purchase qualifying for Residential Energy Credit
- ✓ IRA Contributions/Retirement Contributions
- ✓ Student Loan Interest

**Other Forms to bring if applicable:**

- ✓ 1095-A- Marketplace Health Insurance
- ✓ Letter 6419- 2021 Advanced Child Tax Credit amount received
- ✓ CP01A Notice- Identity Theft Pin letter
- ✓ Letter 6475- Stimulus amount received for Economic Impact #3 (EIP3)