

## Tax checklist 2021

### Personal information (for you, your spouse, and dependents)

- SSNs or ITINs, full names and dates of birth, addresses, telephone numbers and email addresses
- Bank account and routing numbers if you would like a direct deposit
- Amount of alimony paid, ex-spouse's SSN and date of divorce agreement
- Childcare provider records (including the provider's ID number) if applicable
- Copy of your tax 2019 and 2020 tax returns (new clients only; you may qualify for EIC based on 2019 income)
- Copy of your 2018 return if you wish to have it reviewed
- Any tax notices received from the IRS or other taxing authorities

### Income (investments, retirement and business)

- All forms such as SSA-1099, W-2, 1098, 1099, or Schedule K-1 (including Form 1099-G for unemployment receipts)
- Sale/purchase date and total investment in any stocks, cryptocurrency or property you sold
- Closing documents pertaining to real estate transactions - including purchase documents for real estate sold in 2021
- Any contributions that you made to IRAs, retirement plans, HSAs, 529 plans or education saving accounts
- Records of business income and expenses if you are an independent contractor, self-employed, or own rental real estate (you are considered self-employed if you received 1099-NEC) - see another checklist for the self-employed
- Details and amounts of any Covid-19 relief funds received

### Education

- Education scholarships and fellowships or student loan interest paid
- Records of tuition and other higher education expenses, and form 1098-T

### Itemized deductions and tax credits

- Cost of healthcare (medical, dental or vision) or long-term care insurance and healthcare expenses (doctors' visits, prescriptions and medical miles)
- Forms 1098 (mortgage interest)
- Real estate and personal property tax records /cost and date of energy efficiency improvements for a tax credit
- Amount of state/local income tax paid in addition to withheld taxes
- Records of cash amounts donated to church, schools and other charities (deductible even if not itemizing)
- Records of non-cash charitable donations, i.e. donations to Goodwill, etc.
- Childcare provider statement showing their EIN, address and amount paid per child
- Letter 6475 showing accurate amounts of Economic Impact Payments received in 2021 (new in 2021)
- Letter 6419 showing accurate amounts of Advance Child Tax Credits (new in 2021)

### Healthcare

- Form 1095-A, if you enrolled in an insured plan through the Marketplace (Obamacare)
- HSA information (Forms 5498, 1099-SA)

### Disclosures

- Did you have more than \$10,000 in a foreign bank account or have any financial interest in a foreign trust?
- Did you have any financial interest in any virtual/crypto currency in 2021?

