

2021 INCOME TAX CHECKLIST

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INCOME ITEMS

- W2 from employer(s)
- 1099-SNN (Social Security)
- 1099-MISC (Self Employment)
- 1099-R (Retirement)
- 1099-G (Unemployment)
- 1099-DIV, INT (Investments)
- 1099-B (Sale of assets)
- 1095-A (Healthcare)
- 1095-B (Healthcare)
- 1095-C (Healthcare)
- W2G (Gambling/prize income)
- State/City prior-year refunds
- Rental income
- K1 from trust or partnership
- Alimony recieved
- Jury duty pay

DEDUCTION ITEMS

- Unreimbursed medical and dental expenses
- State and local taxes paid
- Home mortgage interest
- Property and real estate taxes
- Gifts to charity
- Clothing donations
- Educacion expenses (1098T)
- Student loan interest
- Child-care expenses
- Alimony paid
- IRA contributions
- Health savings account (HSA) contributions + distributions
- Self-employment work expenses
- Rental expenses
- Solar or Geothermal property cost

*PLEASE BRING THE FOLLOWING

1. Drivers Licence
2. Dependent information (Social Security Number, Birthdates)
3. Bank account information for direct deposit
4. STIMULUS PAYMENT AMOUNT - How much did you recieve?
5. Home & Auto Insurance Declaration Pages
(For quotes during tax appointment)

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