"2021" READINESS CHECK LIST

1. Need amount of **Stimulus** #3 received. (letter 6475)
2. Cards showing Social Security Numbers and/or ITINs are needed along with birth dates of all and proof of residency of dependents.
3. Need ALL W-2's, 1099's, and 1098's; those for interest, dividends, investments, tax refunds, self-employment, sales, pensions, IRA rollovers, unemployment, Social Security, 1099-A, 1099-C, and any other income along with those showing mortgage interest paid.
4. Need 1098-T's with the financial transcript from the college showing 2021 education expenses plus cost of books and needed equipment.
5. **IMPORTANT: Bring your last pay statement & your last pension statement - contains necessary information.**
6. Any miscellaneous or other income and related expenses.
7. Contributions to "Traditional" and "Roth" IRAs & Health Savings Accounts, plus 1099-SA for HSA distribution.
8. NEW Charitable cash contributions of $300 (single) $600 (MFJ) or less are deductible. **(must have receipt, check stub or other proof).**
9. Payments for health insurance, RX insurance, and DDS insurance.
10. **Property tax statements for *both* summer and winter 2021 as well as information giving 2021 taxable value of personal residence.**
11. Rent: Need name and address of landlord and amount of rent paid.
12. Use Tax: Purchases on which no sales tax was paid.
13. **E-file:** Need bank account number for direct deposit.
14. **Advance Child Tax Credit**: Amount received. (letter 6419)

AFFORDABLE HEALTH CARE (ACA) (Obamacare)

- You need to bring Form **1095-A** if you bought insurance through the Marketplace.

►Please provide us with your email address if you have one. Will be used for appointment reminders.

15. Copies of K-1's from partnerships, S Corporations, estates and trusts.
16. Business mileage – Bring start & end odometer readings for 2021 with business miles & interest paid on vehicle.
17. Year-end statements showing transactions from mutual funds/brokerage accounts. ***Important:*** need **all pages**
18. If you bought, sold or refinanced during the year, bring all closing statements.
19. If have foreign bank or retirement accounts, bring 2021 statements.
20. If IRA transferred directly to church or charity, bring proof.
21. Bring a record of the **dates** and **amounts** of any estimated tax payments made, and record of any other payments made.

****** For 2018, 2019, 2020, or 2021 information needed if had: Qualified energy efficient items for your home: windows, doors, insulation, furnace, air conditioner, or water heater.**

Bring a list of your questions/issues/concerns for this tax year & future years

APPOINTMENT CHOICES

Choice to do face-to-face at appointment time
or
Drop off/email/fax/mail your information so we have it 3 days before your appointment time. At appointment time call us to review information, answer questions and arrange a time to sign.

Call for clarification or with questions.