

Name: _____ Tax Year: _____

Personal Tax Return Checklist – All May Not Apply

If you are a returning client & have moved, gotten married/divorced or had children, please complete a new client info sheet

W-2's

Investment Income (1099 INT – 1099 DIV – 1099 B)

K-1's Received from any Corporation, Partnership, Estate or Trust

Unemployment Statement (1099 G)

Social Security Income Statement (SSA-1099)

Amount of Previous Year's State Refund (1099 G)

Pension Income or Distribution Statements from Retirement Programs (1099 R)

Home Sale or Purchase (Need Settlement for each Transaction)

Rental Property Income & Expenses (Worksheet on website)

Farm Income & Expenses (Worksheet on website)

Any Other Income Information (If Business; Business Worksheet on website)

Alimony Received or Paid (Provide Name and SSN)

Retirement Contributions Paid Outside of W-2 Wages (IRA, Roth, SEP, Keogh)

Medical Expenses and Miles (Medical, Dental, Vision, Chiropractic or Medicine)

Vehicle Excise or Property Tax

Real Estate Tax

Any Other Personal Property Tax (Boats, Motor Homes or Trailers)

Home Mortgage Interest Paid (1st & 2nd or Equity Line Interest)

If paid to an individual; Name, Address & SSN of payee are needed

Charitable Contributions (Cash & Checks – Non-cash must be detailed over \$500)

Job Related Expenses that are not Reimbursed

Child Care Expenses (Name of Provider, Address & SSN/EIN are needed)

Copy of Driver's License or State Issued ID

Health Insurance Form (1095 A, B or C)

Did you receive any Advanced Child Tax Credit? If so, How much? _____

Did you pay Tuition or Student Loan? (1098-T or 1098-E)

* * Did you receive the 2021 stimulus payment?

*If so, How much & When? _____

Copy of Previous Year's Tax Return (If not prepared by Accounting Unlimited)

Federal				
State Estimates				
Date Paid				
QTR	1	2	3	4