Accounting Unlimited, Inc.

SPECIALIZING IN SMALL BUSINESSES & TAXES

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 the 2020 stimulus payment?***
****If so, How much?*** ________________________________

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

Federal				
State Estimates				
Date Paid				
QTR	1	2	3	4

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