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 (1^{st} & 2^{nd} 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 pay Tuition or Student Loan? (1098-T or 1098-E)**

☐ ***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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