



*** 2021 Tax Preparation Checklist ***

Checklist of Information Needed to Complete Your Tax Return

If any item listed applies to you, **check the box** and attach the information

INCOME INFORMATION

- Wages (Form W-2)
- Interest Income (Form 1099-INT)
- Foreign bank accounts, income and/or taxes
- Dividend Income (Form 1099-DIV)
- Stock Sale Information/Capital Gains or Losses (Form 1099-B)
- Other Income
- Alimony Received
- Unemployment Compensation (Form 1099-G) State
- Income Tax Refund (Form 1099-G) Social Security
- Benefits (Form 1099-SSA)
- Tip Income not in W-2 wages
- Disability Income
- Jury Duty
- Scholarships (Form 1098-T)
- Education Savings Account Withdrawal (Form 1099-Q)
- Bartering Income (Form 1099-B)
- Gambling Income (W-2G)
- Forgiveness of Debt Income (Form 1099-C or 1099-A)
- Economic Income Payment #3
- Advance Child Tax Credit Payments
- Any other income
- Small Business
 - Business Income
 - Business Expenses
 - Vehicle Information (keep a mileage log for personal vehicles used for business)
 - Form K-1 for Partnerships, S Corporations and Trusts
- Rental Property
 - Rental Income
 - Rental Expenses
- Sale of Property
 - Closing statement for sale of property or purchase of property
 - Cost of improvements made to the property before sale



DEDUCTION INFORMATION

- IRA Contributions
- SEP, Simple, Keogh Plans
- Student Loan Interest (Form 1098-E)
- Alimony paid
 - Recipient Name and SSN
- Medical/Dental Expense
 - Insurance premiums
 - Insurance co-pays RXs
 - Out of Pocket
 - Eye Care
 - Medical Miles
- Real Estate Taxes
- Other Taxes (including sales tax paid on auto, boat or RV purchases)
- Vehicle License Tax paid (find this on your vehicle registration – not the entire amount just the license tax portion)
- Mortgage Interest (Form 1098) First Mortgage Only Investment
Interest
- Cash and Non-Cash Contributions to Qualified Organizations

CREDIT AND PAYMENT INFORMATION

- Child Care Expenses: Provide Name, address, SSN or EIN and amount paid for each child
- Estimated Tax Payments: Provide year and form applied to, amount and date when paid
- Adoption Credit information
- Divorce or Separation information
 - Specify if you are eligible to claim a dependent this tax year for a divorce situation
- Tuition Statements (Form 1098-T)
- Education Expenses