

2021 TAX PREP CHECKLIST

ALL TAX FILERS

- W2's and/ or 1099s
- SS#/Birth certificate for dependents (unless in our system from prior year)
- Our office forms
- 1095-A If Covered CA insurance and Required FTB 3895 for CA. If no Covered CA please provide 1095-B or 1095-C**
- Interest earned. Form 1099INT
- Dividends earned Form 1099DIV
- Stock sales form 1099B
- Crypto sales detail.

HOME OWNERS

- Mortgage Interest
- Property taxes
- Car registration
- Charitable donations
- Interest and Dividend income
- Contributions

BUSINESS OWNERS

- Income total and/or 1099s
- Expense listing and totals
- K1
- Mileage totals: Personal and Business
- Prior year tax return if new client.

UNEMPLOYMENT/STIMULUS PAYMENTS

- Total amount of Stimulus received
- Federal and State unemployment benefit forms
- Advance CTC letter 6419 and total received
- Third Stimulus Payment letter 6475 and total received.

ADDITIONAL ITEMS IF APPLICABLE

- 1098-T for qualifying education
- IRA/HSA forms
- Social Security payment forms
- Student loan interest
- Securities Sale Forms
- Prior year tax return if new client and long form.

****INDICATE WHAT IS INCLUDED AND SUBMIT CHECK LIST WITH FORMS****