A GENERAL LIST OF ITEMS TO BRING

PLEASE BRING ALL OF THE INFORMATION THAT APPLIES TO YOU

NEW CLIENTS: We need a copy of your last return

Contact Information:

- ☐ Updated address, phone number, and email address
- ☐ Bank account routing and account numbers for direct deposit
- ☐ Names and social security numbers of any new dependents **(For 2020 you will need to bring verification with you such as a Social Security Card or insurance record)**

Employment, Retirement, Investments and Other Income:

- ☐ W2s or 1099s for each job and/or 1099 for Unemployment compensation from the Department of Workforce Services
- ☐ 1099R (Retirement distribution forms) and/or SSA-1099 (Social Security Benefits Received)
- ☐ K-1 Forms
- ☐ 1099-INT from Credit Unions and Bank accounts
- ☐ 1099 from Investment Brokerage accounts (Cost basis on stock sales, if not disclosed on 1099)
- ☐ Alimony received and/or gambling winnings

Business or Farm: (optional organizer available on our website)

- ☐ QuickBooks backup along with the password
- ☐ Summary of revenue and expenses categorized by type (office supplies, advertising, training, etc)
- ☐ Miles driven (both business and personal)
- ☐ Cost, description, and date of purchase of any new assets, such as equipment, furniture, vehicles
- ☐ Business use of home: a. If home is your only office, provide square feet of office and square feet of house
  b. Provide cost of annual utilities, insurance, rent, repairs
- ☐ Health insurance premiums not paid through your employer

Rentals: (optional organizer available on our website)

- ☐ Rental income per rental unit
- ☐ Expenses categorized by type (insurance, taxes, interest, etc) per unit
- ☐ Cost, description and purchase date of any new rentals or improvements

Deductions:

- ☐ Alimony paid along with name and SSN of recipient
- ☐ Property taxes paid
- ☐ Sales tax paid on <u>major</u> purchases, such as vehicles, RVs, boats, etc.
- ☐ Form 1098 Mortgage interest paid
- ☐ Closing statements on new purchases or refinance of existing mortgage
- ☐ Donations listed by charity and amount

Education:

- ☐ Student loan interest paid
- ☐ 1098-T from post-high school educational institution (must be provided)
- ☐ Amounts paid for education costs (i.e. computers, supplies, books)

Health Care:

- ☐ Health Savings Account distribution forms 1099-SA
- ☐ HSA contribution forms 5498
- ☐ If you received insurance through the Marketplace: Form 1095-A provided by Health Insurance Provider
- ☐ Inform us if any individuals in the household were not insured during the year

Credits:

- ☐ Day Care: Provide name, social security number, address and amount paid to each day care provider
- ☐ Documentation on any new residential energy credits such as solar panels or electric vehicles
- ☐ Did you receive a stimulus payment? We need to know much you received.

Did you make estimated payments?
We need those amounts.

****Don't forget****
Bring all correspondence received from the IRS.

*****Experience Identity Theft?*****
Don't forget your Identity Protection PIN issued for 2020

<u>NEED MORE HELP?</u>
We have several worksheets to help ensure you haven't overlooked anything. Please call our office for a personalized tax organizer or visit <u>childrichards.com</u> for different business organizers, tips and other useful information.