

2021 Tax Appointment Worksheet

Please bring in the suggested documentation for the events that may have occurred in the past year.

EVENT	DOCUMENTS OR INFORMATION NEEDED
Married, Divorced or Separated	<ul style="list-style-type: none"> • Married-prior year return of both spouses • Divorced-finalized date; copy of divorce decree • Separated- copy of separate maintenance agreement • Community property income allocation
Children Birth or Adoption	<ul style="list-style-type: none"> • Social Security Cards and adoption papers
Death of child or spouse	<ul style="list-style-type: none"> • Date of Death
Additional members of household	<ul style="list-style-type: none"> • Date of occupancy and relationship
Job Change	<ul style="list-style-type: none"> • Start Date • Name of employer • W-2s from new and old employers
Business Income	<ul style="list-style-type: none"> • W-2's, 1099's or K-1's
Retirement Distribution	<ul style="list-style-type: none"> • Form 1099R; rollovers • RMD information if 70.5 or older • Direct transfer to charity? And amount • Brokerage statement showing transfer
Unemployment	<ul style="list-style-type: none"> • Unemployment form, 1099-G
Sale of stocks, bonds, etc., (including mergers)	<ul style="list-style-type: none"> • Form 1099-B or other sale documents • Basis or original costs
Social Security Benefits	<ul style="list-style-type: none"> • Form 1099-SSA
Prizes	<ul style="list-style-type: none"> • Form 1099-Misc; value of prizes not included on form 1099-Misc
Lottery or gambling winnings	<ul style="list-style-type: none"> • Total amount won whether on W-2G or not • Total amount of losses
Inheritance	<ul style="list-style-type: none"> • Will, K-1 from the estate • Basis information
Gifts received	<ul style="list-style-type: none"> • Property- Basis donor
Trade of real property	<ul style="list-style-type: none"> • Date trade, property given up and property received, basis and FMV • Qualified intermediary sales agreements or closing papers
Lawsuit settlements	<ul style="list-style-type: none"> • Date received, reason for the settlement • 1099-Misc
Start or end a small business (Schedule C, LLC, S or C Corp, partnership)	<ul style="list-style-type: none"> • Formation or termination dates • Property contributions or distributions • K-1's if applicable

Rental Property	<ul style="list-style-type: none"> • Income • Expenses • New property purchased
Retirement Contribution	<ul style="list-style-type: none"> • Type of plan • Amount of contribution
Purchase of stocks, bonds, etc., personal residence, or other real estate	<ul style="list-style-type: none"> • Purchase documents; closing papers
Gifts made	<ul style="list-style-type: none"> • Cash or property in excess of 15,000 per person • Description of property given, basis, done name
Health insurance, medical, dental or drug expenses (verification of 1095A, B or C for every person on tax return)	<ul style="list-style-type: none"> • Health insurance premiums; post-tax payments • Totals of other medical, dental, and drug expenses • Health savings account (HSA) information
Medical miles	<ul style="list-style-type: none"> • Total medical miles driven during the year
Business Expenses	<ul style="list-style-type: none"> • 1099-Ks received for use of credit cards • Inventory numbers
Business miles (businesses and rentals only)	<ul style="list-style-type: none"> • Total miles driven per vehicle • Business miles driven per vehicle
Charitable Contributions of money, property, or out of pocket expenses	<ul style="list-style-type: none"> • Date and type of contributions, knowledge that receipts from the organizations have been received • Statement regarding whether goods and services were received for donation • Mileage log for charitable work • Form 1098-C for vehicles or boat donations
Charitable miles	<ul style="list-style-type: none"> • Total charitable miles driven
Transfers from IRA to charity for taxpayers over age 70.5	<ul style="list-style-type: none"> • Brokerage statement showing transfer • 1099-R
Student loan interest	<ul style="list-style-type: none"> • Interest record for student loans • Form 1098-E
Education Expenses	<ul style="list-style-type: none"> • Form 1098-T for parents or children if the child is a student • Actual expense record to verify expenses for credit/deduction purposes • Financial transcript from school showing when actual expenses were paid
Adoption credit	<ul style="list-style-type: none"> • Expenses date and amount, date of adoption • Special needs certification
Child Tax Credit, EIC, HH	<ul style="list-style-type: none"> • Proof child lives in household

Energy Credit	<ul style="list-style-type: none"> Information regarding the purchase of solar or small wind energy property business or residence
Foreign investments or holdings	<ul style="list-style-type: none"> Any foreign accounts Accounts exceeding \$10,000 during the year Foreign business interests or stock of \$50,000 or more Signature authority over foreign accounts
State taxes income, property taxes paid; sales tax paid on vehicles, motorcycles or homes	<ul style="list-style-type: none"> Prior year's income tax return; property tax bills; closing papers from the purchase or sale of property Letter from the state regarding any change in a prior-filed return
Home mortgage interest	<ul style="list-style-type: none"> Forms 1098 Description of use of money
First time homebuyer	<ul style="list-style-type: none"> Distribution from IRA? Amount?
Recapture/repayment 2008 credit	<ul style="list-style-type: none"> Sale or change in use Record of amount paid Year 9 to 15
Child or disabled spouse care	<ul style="list-style-type: none"> Name, address, and ID number of day-care provider Amount paid to provider W-2 if provider comes into home
Bankruptcy filing	<ul style="list-style-type: none"> Date filed Bankruptcy papers-properly rejected/returned by court
Debt forgiveness or abandonment of property	<ul style="list-style-type: none"> Form 1099-A for abandonment Date property was taken by the bank or sold in foreclosure Form 1099-C for cancellation
IRS or State communications IRS Notice 1444 for those who received a 3 rd stimulus check (\$1400) along with proof of amount received	<ul style="list-style-type: none"> Letters, additional taxes paid, changes in prior year returns Installment agreements or offers in compromise