TAX PREPARATION CHECKLIST

- ☐ If New Client, provide copies of last 2 year's tax returns - federal and state
- ☐ **Must Provide Copy of Driver's License for Taxpayer and Spouse**
- ☐ **3rd Stimulus payment (Economic Impact Payment-IRS Notice 1444-C or Letter 6475)**
- ☐ **Advanced payment of Child Tax Credit (IRS Letter 6419)**
  Taxpayer______________________________
  Spouse______________________________
- ☐ All Forms:
  W-2 - Wages
  Social Security Benefit Statement
  1099-G Unemployment Compensation
  1099-INT - Interest
  1099-DIV - Dividends
  1099-B - Proceeds from broker or barter transactions
  1099-R - Pensions and IRA Distributions
  Schedule K-1 from:
    Partnerships
    S Corporations
    Estates and Trust
  1099-MISC - Non-Employee Compensation/Rent Received
  Any Other Income Reporting Statements
- ☐ Health Care Coverage (for each member of the household):
  1095-A - Health insurance purchased from Marketplace
- ☐ Copy of closing statement if you bought, sold, or refinanced real estate
- ☐ Alimony Received or Paid and Date of Divorce or Modification
- ☐ Detail of Itemized Deductions:
  Medical
  Taxes
  Mortgage Interest - Form 1098
  Charitable Contributions
- ☐ Bank information if Direct Deposit Required
- ☐ Completed Summary Organizer and Questions
- ☐ **Signed Engagement Letter**