

Carrie Houchins-Witt Tax & Financial Services LLC
General Tax Preparation Checklist 2021

		Taxpayer	Spouse	What we need
	Last Year's Tax Returns (if we didn't prepare them)			Federal and state returns from last year
	Personal Info (if you're new to us)			Full name, SSN, driver's license
	Children's Info (if they're new to you/us)			Names, SSNs, dates of birth, proof they live with you
INCOME				
	Wages			One copy of each W-2
	SE Income, Interest, Dividends, etc.			One copy of each 1099-NEC, -INT, -DIV, etc
	Business/partnership/trust income			K-1 Form
	HSA distributions			1099-SA
	Retirement Distributions			1099R
	Other income (Alimony received, Gambling, etc.)			Amount and type of income
DEDUCTIONS				
	Educator Expenses (for K-12 teachers)			Amount spent
	Cash Donations			Charity names and amounts given
	Deductible Alimony Paid			Amount
	IRA Contributions			Contribution amount and type of account
	Mortgage Interest, Student Loan Interest, Tuition			One copy of each 1098, 1098-E, 1098-T
	Health insurance premiums paid (if paid after-tax)			Amount paid for each spouse
	Property Tax Paid (May be on form 1098)			Amount
	Auto registrations			Form kept in the glovebox
	Medical Expenses (If they exceed 7.5% of your income)			Amount spent on prescriptions, doctor/dentist visits, hospital stays, medical equipment, etc.
	Charitable Contributions			Charity, date, description & value of each donation
	Other deductions			Amount and type
CREDIT INFORMATION				
	Dependent care credit			Provider name, EIN, address, amount per child
	Amount received as advance payments of Child Tax Credit			Check IRS.gov account if not certain of the amount you received
	School fees			Amount paid per child
	Premium Tax Credit (ACA Marketplace)			Form 1095-A
	Amount of stimulus received during third round of payments (EIP3)			Check IRS.gov account if not certain of the amount you received
	Energy Credits (solar, geothermal, wind, electric car, etc.)			Expense details; credit certificate
MISCELLANEOUS				
	Did you receive, sell, exchange or otherwise dispose of any financial interest in any virtual currency in 2021?			Yes/No
	Estimated tax payments made			Dates and amounts
	Direct Deposit information			Bank name, routing and account number