

THE TAX SHACK INC

CHECKLIST FOR INDIVIDUALS

Documents Related to Personal Information	
Letter CP01A - If you were assigned an IP PIN Number	
Driver's License or State ID if you renewed during the year	
Birth Certificate and/or Social Security Card for any new dependents	
Form 8332 if you are a noncustodial parent claiming your child	
Updated Bank Account Information for Direct Deposit of Refunds	
New Contact Information if it changed or you moved	
Did you make Estimated Tax Payments?	
Quarter 1 _____	Quarter 2 _____
Quarter 3 _____	Quarter 4 _____

Documents Related to Income	
Letter 6475 Stimulus	1099-B Sale of Investments
W-2	Need Purchase Date, Cost, Sales Date and Sales Price
1099-R Pension/Annuity/IRA	1099-S Sale of Real Estate
SSA-1099 Social Security	Need Purchase Date, Cost, Sales Date and Sales Price
1099-G Unemployment	Plus the cost of any major improvements
1099-G Paid Sick Leave	Income from Installment Sale
1099-HSA Health Savings Account	Need Total Principle and Total Interest Received
1099-INT Interest Income	Need Contract and Amortization Chart in First Year
1099-DIV Dividend Income	Cryptocurrency - You have income if you sold it,
W-2G Gambling Winnings	exchanged it, earned it, bartered it, received it in a fork or
1099-B Barter Income	air drop, bought stuff with it or cashed it in at the ATM.
1099-A Abandoned Property	1099-NEC Nonemployee Compensation
1099-C Canceled Debt	1099-K Merchant Services
1099-Q Qualified Education Plans	Schedule K-1 (1065) for Partners
Grants/Fellowships/Stipends	Schedule K-1 (1120-S) for Shareholders
Alimony Received (Pre-2019 Divorce)	Schedule K-1 (1041) for Beneficiaries
Jury Duty Income	1099-Misc Miscellaneous Income
Prizes and Awards	Hobby Income
Legal Settlements	Any Other Income not listed here

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CHECKLIST FOR INDIVIDUALS - continued

Documents Related to Deductions and Credits			
Letter 6419	Advanced Child Tax Credit	1095-A	Marketplace Health Insurance
	IRA Contributions - Traditional		Health Insurance Premium Costs
	IRA Contributions - ROTH		Dental Insurance Premium Costs
	IRA Contributions - Other		Long-Term Care Premium Costs
	Investment Interest Expenses		Prescriptions, Eyeglasses/Contacts
	HSA Contributions		Doctors, Dentists, Hospitals, Clinics
	Alimony Paid (Pre-2019 Divorce)		Medical Equipment and Supplies
	Educator Expenses - Including PPE for Primary and Secondary Educators		Medical Transportation
			Medical Miles Driven
	Daycare Expenses - Need caregiver's Name, Phone #, Address, and Tax ID #		General Sales Tax Paid (receipted)
			Sales Tax on Vehicle Purchase
	Adoption Expenses		Mortgage Interest - Main Home
1098-E	Student Loan Interest		2nd Mortgage Interest - Main Home
1098-T	Qualified Tuition		Property Taxes - Main Home
	Also print a tuition summary from the school		Purchase or Refi? Bring Settlement Statement
	Education Expenses - Need receipts for books, supplies, equipment, and fees for attending the qualified college/university/trade school		Mortgage Interest - 2nd/Vacation Home
			Property Taxes - 2nd/Vacation Home
			Charity Receipts - Monetary
	Residential Energy Improvements New Insulation, Exterior Doors/Windows, Heat Pump, Central Air, Furnace, Wood/Pellets, Metal Roof, etc.		Charity Receipts - Goods/Property (donations over \$5000 require appraisal)
			Volunteer Mileage
	Electric Vehicle Purchase (w/certificate)		Gambling Losses (if you had winnings)