Checklist For Having Your Income Taxes Professionally Prepared By:

PH (330) 434-6655 **1040Plus** FX (330) 434-8130
2775 Front Street Cuyahoga Falls, OH 44221

Personal Information

Social Security Numbers, D.O.B.s, DL No. - Iss. - Exp.

- ❑ Yours
- ❑ Spouse's
- ❑ Dependents

see note *

Child Care Expenses

- ❑ Care Provider's name
- ❑ Care Provider's address
- ❑ Care Provider's Tax ID or SSN
- ❑ Cancelled checks, receipts, or invoice

Adoption Expenses

- ❑ Legal Fees
- ❑ Transportation & Other costs

Education Expenses

- ❑ Form 1098-T tuition statement
- ❑ Cancelled checks, receipts, or invoice for post-HS education

Bank Information (for direct deposit of refund)

- ❑ Bank routing number (RTN)
- ❑ Your account number
- ❑ Account type (checking or savings)

see note *

Other

- ❑ Federal, State, or Local Estimated Taxes Paid for 2020

Income

- ❑ Your W-2s
- ❑ Spouse's W-2s
- ❑ Interest income Form 1099-INT
- ❑ Dividend income Form 1099-DIV
- ❑ Social Security Benefits Form SSA-1099
- ❑ Unemployment income Form 1099-G
- ❑ Gambling and Lottery Winnings Form W-2G [1]
- ❑ State or Local Tax Refund Form 1099-G [2]
- ❑ IRA or Pension distributions Form 1099-R
- ❑ Income from Partnership or Corporation K-1
- ❑ Prizes and Awards Form 1099-MISC
- ❑ Self-Employment or Rental Income Form 1099-MISC [2 3]
- ❑ Health Savings Account distributions Form 1099-HSA
- ❑ Proceeds from sale of stocks, bonds, etc Form 1099-B
- ❑ Proof of cost basis for any stocks, bonds, etc sold
- ❑ Jury Duty pay records
- ❑ Alimony received

[1] receipts for gambling purchases may be used as an itemized deduction to offset gambling winnings

[2] this income is not always reported on a Form 1099; verify from your records instead

[3] expenses related to Self-Employment or Rental Income may be used to offset this income

Adjustments and Deductions

- ❑ IRA/SEP Contribution for You/Spouse
- ❑ Health Savings Account Contribution for You/Spouse
- ❑ Self-Employed Health Insurance premiums paid
- ❑ Alimony Paid
- ❑ Student Loan Interest Form 1098-E
- ❑ Penalty on Early Savings Withdrawal
- ❑ Educator Expenses (for educators)

Medical and Dental Expenses

- ❑ Unreimbursed Medical/Dental bills, including Rx drugs
- ❑ Mileage Records for medical/dental visits
- ❑ Out-of-pocket insurance premiums paid
- ❑ Health Insurance Marketplace Form 1095-A (required)

Taxes Paid

- ❑ Amount Due from last year's State and Local returns
- ❑ Real Estate Taxes on your main and vacation home
- ❑ Personal Property taxes paid

Interest Paid

- ❑ Mortgage Interest on main/vacation home Form 1098
- ❑ Points paid on home purchase in 2020
- ❑ Proration of points paid on refinance
- ❑ Investment Interest Expense from brokerage statement

Charitable Contributions

- ❑ Cancelled checks/charity bills/receipts for cash donations
- ❑ Records of mileage incurred for charitable purposes
- ❑ Receipts for date/description/value of donated property

[NOTES]

* We have this info if we prepared your 2019 tax return. Note any changes below.

Stimulus Payments Received in '20/'21:

T PHONE: S PHONE:

1040Plus™
Prepare • Plan • Prosper

Email: support@1040plus.com Chat: https://1040plus.com/chat
Secure Email w Private Message: 1040plus@share.hyperfiles.net
Secure Upload: https://share.hyperfiles.net/filedrop/1040plus